Specialty store		Other		
'83	'84	'83	'84	Product
22.6%	23.3%	3.7%	6.0%	Jeans (all)
21.8	29.3	6.3	6.1	Men's jeans
23.4	17.7	1.6	5.6	Women's jeans
57.7	50.3	2.0	2.9	Athletic shoes (all)
57.6	51.8	1.6	3.4	Men's athletic shoes
57.8	48.8	2.2	2.3	Women's athletic shoes
NS	14.0	NS	3.0	Activewear (all)
17.8	12.5	—	—	Men's activewear
NS	15.0	NS	5.8	Women's activewear
10.2	9.9	3.4	1.0	Infant sleeper
10.2	5.6	3.2	4.7	Children's overall
NS	9.8	NS	3.0	Bra/panties set
NS	21.7	NS	2.2	Dress (work or casual)
24.7	29.3	2.1	2.6	Men's dress shirt
26.0	34.0	0.1	1.0	Men's casual slacks
NC	15.1	NC	1.9	Men's fashion underwear

gage and instant cameras. For each of the last three products, sales in '83 came in below '81.

Regional selling strategies

Where consumers will be shopping is as important as what they are buying. This year's *CSA*/Shapiro study shows that New England is enjoying a recovery while the Pacific Coast States are less vigorous than in the past.

A year ago New England provided marketers with few customer prospects for hard lines. The overall condition was classified as poor. That signal has changed to moderate.

Moderate also describes the Pacific region, a territory that had previously been favorable in '81 and '82. The seven other sections of the country kept the same designations of last year.

The regional breakouts provide a gauge of how easy it will be for retailers to find shoppers predisposed to buying each product. Measurements were rated against the norm. For those falling within the norm, a question mark in the charts signifies buyer ambivalence. Those favorably inclined to purchase an item are represented by a plus sign. Responses below the norm are shown with minus signs. □

Mountain/W.N. Central states strongest buying intentions

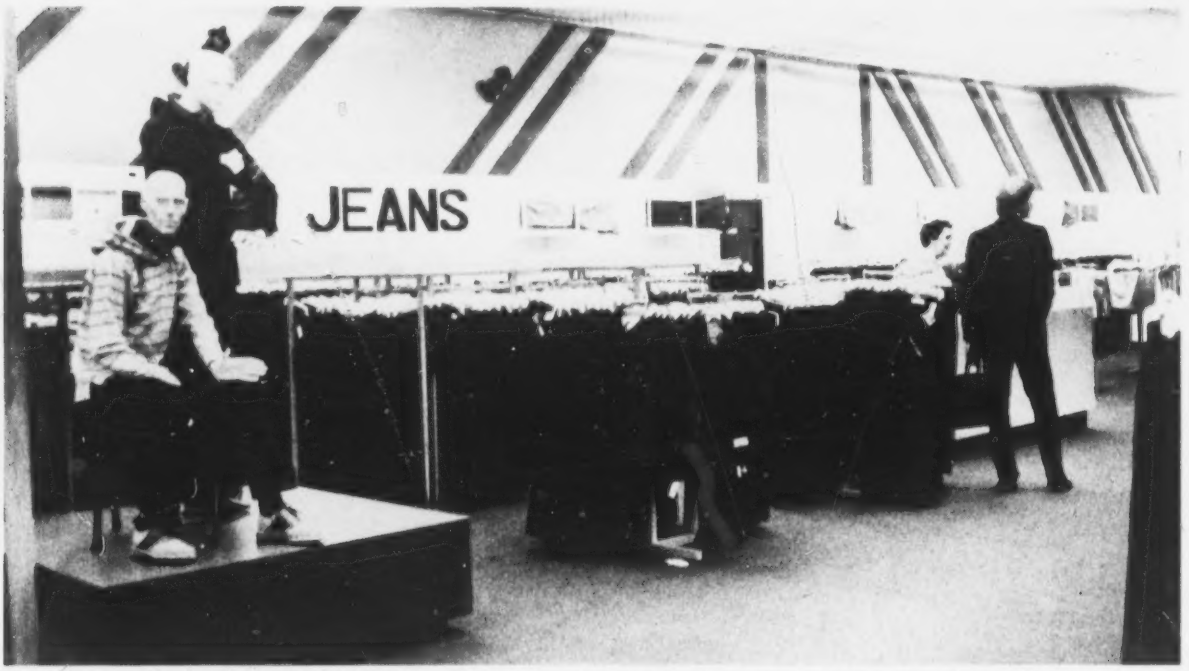
Product	New England	Mid-Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Portable fan	?	—	?	?	?	—	+	?	?
Smoke detector	?	?	—	?	?	+	—	—	?
Garage door opener	?	—	+	+	—	—	—	—	?
Electronic bug killer	—	—	—	+[R]	+	—	+	—	?
Barbecue grill	?	—[R]	?	?	?	—	?	+	?
Patio furniture	?	?	—	?	?	—	—	+	?
35mm camera	—	—[R]	+[R]	+	—	—	+	?	?
Instant camera	—	?	—	+	—	—	+	—[R]	?
Home photo develop. equip.	?	+	—	+	—	—	—	+	+
Home exercise equip.	+[R]	—	?	?	—	—	?	+	?
Bicycle	+[R]	?	?	+	—[R]	?	—	?	?
Tennis racket	+	+	—	—	—	—	+	+	?
Steel file cabinet	—	?	+[R]	+	?	—	—	+	—[R]
Typewriter	+[R]	?	—	?	?	—	?	+	?
Printing calculator	+	?	—	—	—	—	+	+	+
Sewing pattern	+	—	?	+	—	?	—	+	?
Craft kit	+[R]	—[R]	?	+	—	—	—	?	?
Paperback romance novel	?	+	—	—	—	+	—	+	?
DIY instruct. book/ manual	?	+	—	—	—	—	—	+	+
Luggage	?	?	—	?	?	—	—[R]	+[R]	?
Recliner chair	—	—	?	—	+	—	+	?	?
Watch	?	?	?	—	?	+	—	?	?
Facial moistur.	?	?	?	+	—	+	?	—	?
Enamel/ porcelain tea kettle	—	+	—	—	?	—	?	—	+
Vacuum cleaner	?	?	—	?	?	—	—	+	?
Bathroom scale	+	—	?	?	?	—	?	?	—
Place mat	?	?	—	?	—	+	+	—	—

+ Favorable buying intentions **?Moderate buying intentions** **—Poor buying intentions**

[R]Reversal from 1982 (either + to − or − to +)

New England: Me., N.H., Mass., Vt., Conn., R.I. *Mid-Atlantic:* N.Y., N.J., Pa. *East North Central:* Ohio, Wis., Mich., Ill., Ind. *West North Central:* Minn., Iowa, Mo., Kan., Neb., S.D., N.D. *South Atlantic:* Del., D.C., Va., W. Va., N.C., S.C., Ga., Fla. *East South Central:* Ky., Tenn., Ala., Miss. *West South Central:* Ark., La., Okla., Tex. *Mountain:* Mont., Idaho, Wyo., Colo., N.M., Ariz., Utah, Nev. *Pacific:* Wash., Ore., Calif., Alaska, Hawaii.

Source: *CSA*/Leo Shapiro & Associates



***More men are buying jeans** in specialty stores; have department stores been too quick to cut assortments?*

Jeans' popularity still riding high

For the second year in a row, the majority of shoppers polled in the *CSA*/Shapiro survey indicated they intended to purchase jeans. This year, however, a greater number said they were not shopping for brands.

The lack of preference for brands follows a trend among consumers to buy what *they* perceive is quality merchandise, not what is being touted as quality, say industry observers.

Nearly 25% more men cited no brand preference. In the 1982 study, a little over 23% admitted they were indifferent to brands; this year the number jumped to 29%. Women also showed less preference toward brands, although the increase was not as great (5.8%). For 1982, a little over 24% were apathetic to brands; this year 1 in 4 feels that way.

Of the brands named, Levi's was tops on both men's and women's shopping lists, with nearly 1 in 3 consumers planning to purchase this brand, an increase of 8.4% over last year. Women are chiefly responsible for the increase: An additional 49.1% stated they expected to buy Levi's in '84. By contrast, fewer men anticipated buying the brand this year; their number dipped 15.2%.

Lee topped Wrangler as the No. 2 name brand listed by all consumers. About 42% more women said they would shop for Lee jeans, while 50% more men claimed they would buy this brand. Wrangler dropped in popularity, with 28% fewer shoppers maintaining they would buy this brand.

Designer jeans continued to fall from consumer grace. Less than 5% of American shoppers claimed they would purchase Calvin Klein, Jordache or Sasson. Store brands also fell from favor. Last year nearly 17% of all consumers said they would seek a store brand; this year, a little under 11% favored this kind of brand, a drop of 35.1%.

As they have done in the past two years, women elected to buy their jeans in department stores. In fact, the same number of women, 36.3%, said they would buy jeans in department stores this year.

In the coming year, 27.5% fewer men expected to browse keystoners: Instead, they named spe-

Brands lose favor with consumers

	1983			1984		
	All shoppers	Women	Men	All shoppers	Women	Men
Levi	29.7%	21.2%	38.7%	32.2%	31.6%	32.8%
Lee	6.3	8.3	4.0	9.0	11.8	6.1
Wrangler	8.2	7.6	8.9	6.4	3.7	9.2
Calvin Klein	3.1	3.0	3.2	2.2	2.9	1.5
Jordache	2.3	3.0	1.6	1.9	2.9	0.8
Brittania	0.4	0.8	—	0.7	0.7	0.8
Sasson	0.8	1.5	—	0.7	1.5	—
Store brand	16.8	16.7	16.9	10.9	8.1	13.7
Other	8.6	13.6	3.2	8.6	11.0	6.1
Not answering	23.8	24.3	23.5	27.4	25.8	29.0

Source: *CSA*/Leo Shapiro & Associates

cialty stores, perhaps indicating that department stores may have moved too hastily in cutting back jeans assortments for men.

Despite the catalog chains' push to garner a bigger apparel base, more women are not stepping up their commitment to purchasing jeans at Sears or Penney—31% fewer women said they would shop Sears in 1984, while 10.9% fewer would go to Penney. However, the same number of women—1.6%—will head to Ward's in 1984.

In men's jeans, the effect of Levi's at Sears and Penney is unclear. Nearly 34% more men would shop Sears for jeans in 1984 than 1983. Nonetheless, 24% fewer men would shop Penney for jeans next year, according to the *CSA*/Shapiro data.

Roughly the same number of shoppers who said they would go to K mart in 1983 would also head there in 1984. But more men and women would go to other discounters next year. Last year, 4% of the women said they would shop all other discounters. This year, 11.3% would go to these stores, reflecting a hefty hike of 183%. Men, however, were not quite as hearty in their approval of discounters. About 7% more men would shop this type of store.

Men and women were at odds about how much they would pay for jeans. Nearly 1 in 3 women said they would shell out between $20 and $24.99. Not so men: More than 1 in 3 said they would fork over between $15.99 and $20, the popular price points for both men and women last year. The majority of men surveyed maintained they would pay $19.99 or less, while most women would not pay more than $24.99.

This year, nearly 60% of both men and women anticipated buying jeans—just slightly more than last year (58.8%). As might be expected, consumers age 45 and under make up the major audience for jeans. □

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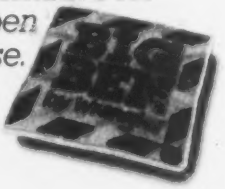


Activewear finds comfortable niche

Activewear is well on its way to becoming a standard element in many Americans' wardrobes. It has become so acceptable, in fact, that those who voted for the 1984 Olympic athletes' parade apparel chose activewear over a more traditional blazer and skirt/pants combo and Western wear.

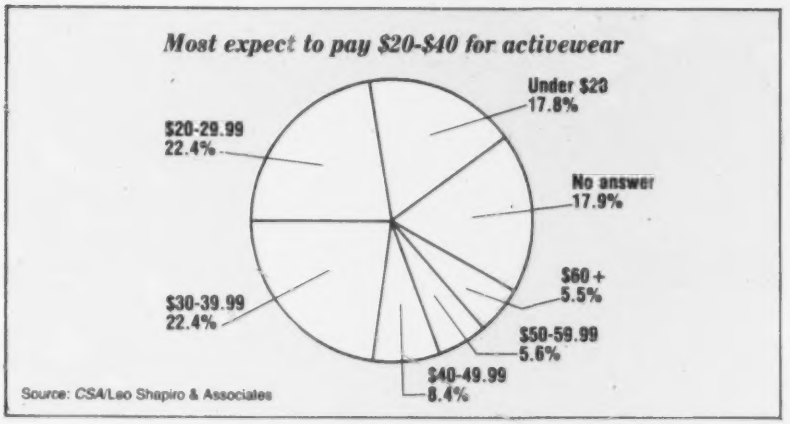
The percentage of men and women who plan to buy activewear in the coming year has doubled since the item was first tracked in the *CSA*/Shapiro survey in 1981. Back then, only 7.9% of men and 12.4% of women thought they might shop for activewear in the near future. In the most recent poll, 21.9% of men and 25.7% of women had activewear on their minds.

It's likely that a broader range of Americans, from toddlers to grandmothers, will be sporting active ensembles in the next year. The category, however, gets its strongest boosters from the 30-39 age group among both men and women, unchanged from the 1981 survey.

This year a larger percentage of older women are more likely to buy activewear than men in the same age group. Of those polled, 24.2% of women age 35-44 planned to buy activewear; only 16.4% of men the same age planned to do so.

But only those most able to afford leisurewear plan to buy it. Both men and women said they'd delay buying if they had to curb spending—a continuation of the trend found two years earlier. Only slightly more than 1 in 10 shoppers whose income has been affected by the wavering economy this year planned to buy activewear. More than half of the women surveyed had already cut their clothing budgets. Only 36.2% of men had cut out clothing in general, but 57.1% believed activewear was something they could do without if they took any further cuts.

Two years ago the most popular price range for both men's and women's activewear (picked by 42.9% of consumers) was $30-$29.99; this



***National brands of activewear** lost ground to store brands and no brands.*

year, the largest percentage of consumers (22.4%) is willing to spend $30-$39.99. The top price point is generally $39.99, but 1 in 10 men believed he'd pay $50-$59.99.

Despite their willingness to spend slightly more for activewear than in the past, shoppers are not brand-conscious. No one national brand was designated a "must buy"; names like Nike, Adidas, Jantzen and Champion appealed to fewer than 1 in 10 shoppers. Store brands, in fact, were the most frequently named brands in the '83 survey. Only slightly more than 1 in 10 shoppers planned to buy a house label, however; two years ago, one-fifth of both men and women were looking for store brands. Of all the apparel categories tracked, activewear had the largest percentage of respondents with no brand preference. Almost three-fourths of the men queried and two-thirds of the women didn't know what brand they planned to buy.

Even though they expected to pay more for activewear than two years ago, shoppers are planning to go to less expensive stores. In the '81 study, the largest group of both men and women opted to buy activewear at department stores. In the '83 survey, that's still the case with women, but discounters caught on surprisingly well with men. In 1981, only 3.4% of the men surveyed planned to shop discounters; in 1983, 32.5% would patronize discounters—an almost tenfold increase. The percentage of women planning to shop discounters remained the same (17%) for the two periods.

Perhaps female shoppers have known all along that they could find value-oriented activewear at discounters, while men took two years to figure it out. The fact that more discounters are now carrying national brands of functional activewear as well as fashion-oriented private label and moderate brands may have done the trick, too.

Losers in the market share battle were J. C. Penney, Montgomery Ward, sporting goods chains and specialty stores among male shoppers. Female shoppers remained truer to their shopping patterns of two years ago, with a few shifting from Sears to Penney (much stronger with women than men in '83) and from specialty stores to department stores. □

Department stores tops in bras/panties

The profile of the consumer who buys bra/panty sets is almost identical to the shopper targeted by the department store: More than one-third are between the ages of 30 and 39, have some college experience or a college degree and have a household income of $20,000 or more.

It's not surprising, then, that this shopper prefers to buy bra/panty sets at department and specialty stores. With these stores offering wide selection and convenient displays, over 50% of the women surveyed by *CSA*/Shapiro expected to purchase these items there in 1984.

One in four women said they would buy bras that coordinated with panties, reflecting the trend toward more sophisticated lingerie being purchased in the marketplace, say buyers.

If women can't find what they want at department stores, they'll head to Sears next. Over 14% of American women elected to buy matching bras and panties at the nation's No. 1 retailer, while Penney was the choice of only 8.8%.

K mart trailed behind Penney by less than three percentage points. Industry observers say this may be due to the impact of "brands for less" merchandise in K mart's lingerie department. The discounter has been able to make a sizable dent in this category, say watchers, who claim in other categories the store has not garnered this kind of consumer commitment. Other discounters attracted less than 7% of consumer traffic for matching bra and panty sets.

Despite the fact that shoppers intended to buy at department stores, they did not show great interest in brand names. No brand earned double-digit recognition. Vanity Fair and Maidenform shared top honors with shoppers, but this was only with 5.3% of those surveyed. They were followed by Olga, with 4.4%, and Playtex and Bali, both with 3.5%.

Store brands, however, racked up the largest following. Over 13% of

Who buys bra/panty sets?			
	% of polling base	% of bra and panty shoppers	% difference
Age: 25-44 years old	42.0	52.7	+25.5
Income: Over $20,000	47.0	55.4	+17.9
Schooling: Some college/ college graduate	42.2	50.0	+18.5

Source: *CSA* Leo Shapiro & Associates

those polled said they would buy private labels. But the majority did not give any name brand or store brand preference.

Most shoppers expressed concern with price. Very few were willing to pay more than $25 for matching bras and panties. In fact, $25 and above accounted for only 10.6%. The majority of women claimed they would pay between $10 and $24.99. A little more than 1 in 5 said they would purchase bra and panty sets between $5 and $9.99.

Where women live plays a role in determining whether they will buy matching bras and panties. Women residing in the East North Central, West North Central, East South Central and West South Central regions are more likely to buy these items than women living in other areas of the country. Preppie New Englanders, in fact, are the least likely to purchase matching sets, perhaps reflecting their conservative roots. □

***Parents of children under 2** are the most likely group to buy overalls.*

More parents to buy overalls in '84

If retailers doubt there is a baby boom occurring, they can take heed from the results of the latest *CSA*/Shapiro survey. Forty per cent more consumers said they would buy children's overalls in 1984 than in 1983.

In '84, nearly 1 in 5 parents would buy overalls for their children. Parents with infants 2 years old or younger are most likely to purchase this item, followed by those with tots between the ages of 3 and 5. Even those parents with kids age 12 to 17 indicated they would shop for overalls.

These parents, however, don't intend to pay more this year than they did last year. In fact, designated price points are almost identical: One in 3 parents said they would shell out between $10 and $14.99 (similar to last year), 28.8% would plunk down between $5 and $9.99 and 14.1% between $15 and $19.99.

Where there is a noticeable difference between last year's results and this year's is in brand preference. Parents are becoming more vocal about branded clothing for children. OshKosh again was the brand leader, raising its score from 6.2% to 12.2%. It was followed by Health-tex, Levi, Wrangler and Lee.

Designer apparel, according to the *CSA*/Shapiro data, appears to be fading in importance. The only "designer" line mentioned by shoppers was Jordache, and this was cited by just 1.3% of parents. Store brands also took a beating, dropping 15.2% in popularity in the last two years. But they still commanded an impressive 20.5% of all mentions.

In addition, consumers appear to be shifting store allegiance. Department stores gained consumer acceptance. Last year, a little more than 1 in 5 said they would shop these stores. This year, nearly 30% showed preference for this type of store, a 33% increase. Industry observers attribute this to the increased attention paid by stores such as Macy's and Marshall Field's to children's wear.

Branded children's apparel is growing in importance (% shoppers who might buy)		
	1983	1984
OshKosh	6.2%	12.2%
Health-tex	5.7	5.8
Levi	5.2	3.8
Wrangler	2.1	2.6
Lee	1.5	2.6
Carter	4.1	1.3
Jordache	—	1.3
Garanimals	0.5	0.6
Store brand	24.2	20.5
Other	8.7	1.9
Not answering	41.8	47.4

Source: *CSA* Leo Shapiro & Associates

Of the three catalog chains, Penney scored the highest increase. This year 16% gave the nod to Penney's, a gain of 36%. Sears, on the other hand, lost favor with shoppers; about 22% fewer consumers than last year said they would go there.

What's more, shoppers didn't vote in favor of K mart or all other discounters. Both categories lost ground, with 20.6% fewer consumers mentioning K mart and 13.4% fewer shoppers preferring other discounters.

Income doesn't play a large role in determining whether a parent will buy overalls. Those parents with household incomes over $20,000 are just as likely to buy children's overalls as those with incomes under $20,000. □

***Women are less** likely than men to buy a store brand of athletic footwear.*

Athletic shoes broaden appeal

The percentage of American men and women planning to buy athletic shoes has been steadily increasing for the last three years, according to the *CSA*/Shapiro surveys. Two years ago, when shoes were first tracked, only 22.3% of men and 28.4% of women planned to buy sport shoes in the coming year. Today, more than twice as many men (46.4%) and a significantly higher percentage of women (39.8%) have athletic shoes on their shopping lists for next year.

Athletic shoes are also appealing to a broader range of ages. For men, shoes still have the strongest pull with men under 25; nearly half of this age group planned to buy next year. But more than a quarter of men age 45-54 also were in the market for athletic shoes—twice as many as last year.

Women between 25 and 44 are the most likely to buy athletic shoes in the next year, with about 3 in 10 planning a purchase. Here again, the interested age group has grown. Last year, athletic footwear was strongest with women under 25, with about one-quarter of that group planning to buy. This year, about the same percentage of the under 25's plan to buy athletic shoes, but larger percentages of older women are showing interest. Among those 35-44, for example, twice as many (30.8% vs. 14.5%) planned to buy athletic shoes in '84 as opposed '83.

For the three years, the largest group of both men and women who were planning to buy had incomes in the $20,000-$30,000 range. Those most positive about the economy and their incomes were also the most likely to buy. For the three years studied, the percentage of women who claimed they would not postpone buying athletic shoes—over 50%—remained virtually unchanged. In 1981 and 1983, men were equally divided between postponing the purchase and buying. Last year, however, more than two-thirds of the respondents would not delay buying.

Both men and women expected to pay a few dollars more for athletic footwear than they did in the past two years. One-third expected to pay between $20 and $30.

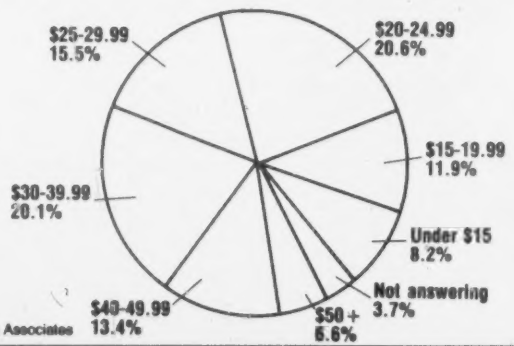
Men were more undecided this year about where they planned to buy, with a higher percentage (18.3% this year vs. 13.2% last year) listing no store preference. Men generally continued the same shopping pattern of the last two years. The largest percentage planned to shop specialty stores, though the rating dropped by 5.8%. Sears also lost about 5%.

Women were more likely to shop at Sears, a department store or an off-price chain than they had been in the past two years.

Nike increased its pull among women, with more than 1 out of 10 planning to buy that brand. More than twice as many women planned to buy Adidas than in the '81 survey. Other brands fared less well, and fewer women planned to buy a store brand this year than last, which ties in with their lack of interest in shopping the catalog chains.

Nike gained some strength among men since the '81 study, although it slipped somewhat from last year's high of 30.9% recognition. Men were nearly twice as likely to buy a store brand of athletic shoes this year as in '81, and more than twice as likely to buy store brands than women. □

$20-$40 most acceptable price for athletic shoes



Source: *CSA*/Leo Shapiro & Associates

Fashion briefs: new basics?

Only 15.4% of the national sample of men surveyed by *CSA/* Shapiro felt they'd be buying fashion underwear—colored basic styles and low-rise briefs—in the next year. Of the 10 apparel items tracked, fashion briefs had the lowest shopping incidence.

However, men who do show interest in fashion underwear are determined. Even if their incomes are threatened, these potential shoppers do not expect to postpone buying. This indicates that fashion briefs have become a staple garment, replacing plain underwear in certain wardrobes.

Those who feel positive about the economy are still the most likely to shop for fashion briefs. Even four out of 10 potential buyers who thought they might lose their jobs or have to take a cut in income next year still planned to buy fashion underwear.

Only one third of potential fashion underwear buyers indicated they would delay buying if they cut back on spending. Except for children's items, fashion underwear was the least likely apparel item of those tracked that shoppers would postpone buying. Half of the potential underwear shoppers said they had already cut back on clothing purchases, but fashion underwear was still in their budget.

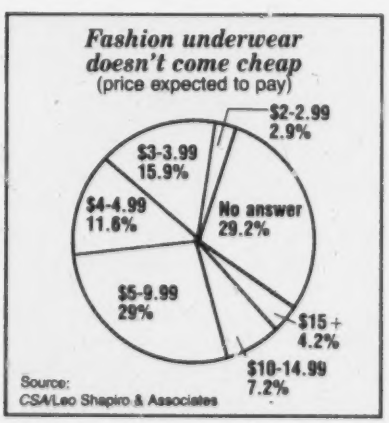
To boost sales, manufacturers and stores should attempt to appeal to older customers. The largest group (38.5%) of those planning to make purchases in the next year fell into the 25-34 age group. Younger men were also very much interested in fashion—almost one third of those under 25 indicated they planned to buy fashion briefs in the coming year.

The target customer is a young, well-educated professional. About one third of those planning to buy earned between $20,000 and $30,000; another quarter earned over $40,000. However, fashion underwear seems to be catching on with blue-collar workers as well. While managers indicated a strong preference for fashion looks, so did laborers.

Price apparently is no object. The largest number of men (29%) expected to pay $5-$9.99. Only 2.9% expected to pay between $2 and $2.99, or what the average pair of all-cotton white briefs costs. Another 4.2% thought they'd have to shell out more than $15 for fashion underwear. These price ranges, however, may indicate that men plan to buy fashion underwear in multipacks, much as they would basic white. Nevertheless, the higher price points associated with fashion briefs, and consumers' willingness to pay those prices, should translate into profits for men's furnishings departments.

Perhaps because they expected to pay a lot for fashion underwear, the largest percentage of men (43.4%) planned to shop at department stores. Discount stores ran neck-and-neck with Sears (each with 13.2% of shoppers) as the place to go for fashion underwear. Surprisingly, Penney, which carries its own Lupo brand as well as national brands, was the source for only 7.5% of the survey respondents.

Jockey and Fruit of the Loom enjoyed the strongest brand recognition. Only a very few shoppers named Wrangler, Levi's or Sasson as underwear brands they planned to buy. Apparently, shoppers have not made the transition from jeans to underwear for these brands. Almost 1 in 10 shoppers planned to buy a store brand of fashion underwear—good news for Sears and Penney, less so for Montgomery Ward, which no one named as a store he planned to shop for fashion underwear. □



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Young men want jeans alternatives

Young men under 25 showed the strongest interest in buying casual slacks next year, according to the *CSA*/Shapiro survey. Nearly 37% of men under 25 in the survey said they'd be in the market for a pair of casual slacks.

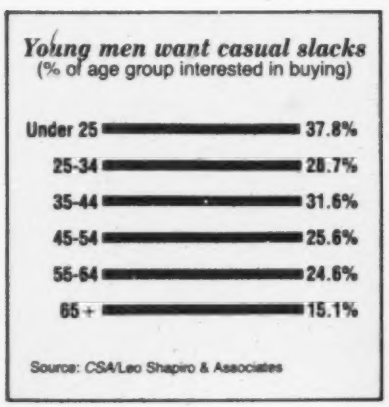
Overall, more than half of all men queried this year said they'd be in the market for casual slacks. In 1982, only 19.6% said they planned to buy in the coming year.

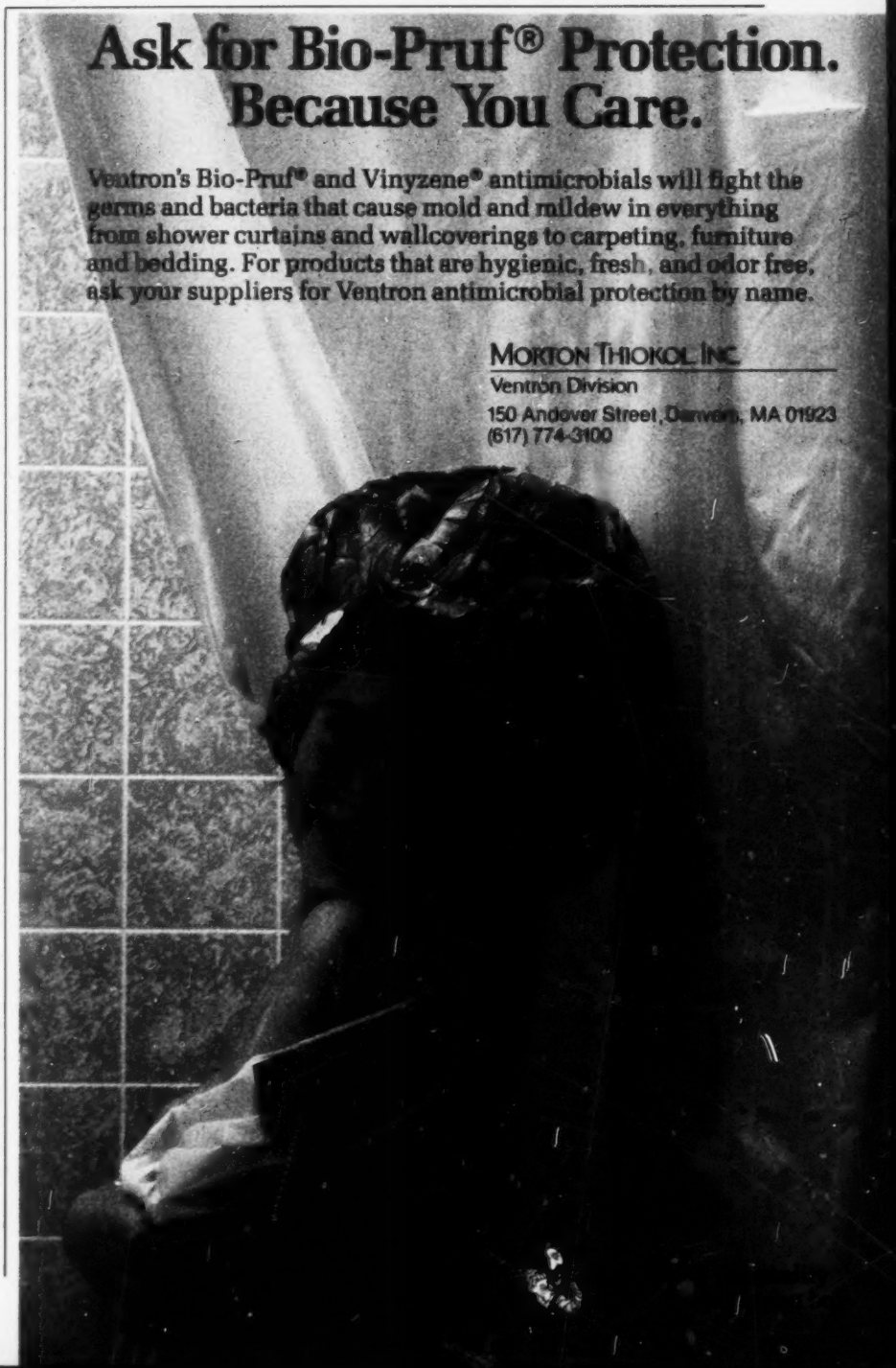
Are men growing bored with denim jeans? Apparently not. In every age group except those age 55 and up, a larger percentage of men planned to buy jeans than casual slacks. However, the percentage of men indicating interest in casual slacks this year more closely parallels that of jeans. Last year, while only 19.6% of men said they might buy casual slacks, 57.4% planned to buy jeans. This year, while 58.5% planned to buy jeans, 52.2% also planned on buying casual slacks.

Men expected to spend about the same amount this year as last on casual slacks. More than half would pay between $20 and $39.99, with the $30-$39.99 price range being the limit for nearly one-fourth of those surveyed.

While apparel prices have generally stayed below the inflation rate, men can expect to pay about the same as last year because they're shopping more price-oriented stores. Last year, department stores were the first place men would look for casual slacks, with 35.6% planning to shop there. This year, about the same number will shop department stores, but specialty stores are topping the list (34% of men plan to go there, up from 26% last year). The catalog chains retained their following, and more men planned to shop discount chains.

Demand for national brands is up slightly. The most-wanted brand is still Haggar, with 13.7% of respondents listing it as a brand they planned to buy. Fewer than 1 in 10 men planned to buy any other specific national brands, such as Levi's, Farah, Lee or Sasson. Almost as many men planned to buy store brands as planned to buy Haggar. Last year, the percentage of men who planned to buy store brands and Haggar was nearly identical. □

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Price slips as buying influence

***Quality was mentioned** for the first time as a reason to shop K mart.*

Housewares consumers' attitudes reflect the improving economic picture, notes this year's *CSA*/Shapiro study.

Compared to last year's survey, selection and quality became more important deciding factors in choosing a store for housewares. Price/discount fell considerably but remained the No. 1 deciding criterion.

Department stores reflected the greatest consumer shift from price/discount to quality and selection, suggesting shoppers have noticed the stores' recent emphasis on better housewares assortments.

Of all consumers planning to make a housewares purchase this year, 18.5% say low prices influence their department store choice. This represents a decline of 24.7 percentage points over last year's figure. Those choosing selection as the primary reason to shop a store rose from 15.4% to 25.2% in 1983; those selecting quality increased from 9.7% to 17.8%.

Reasons for shopping Montgomery Ward also followed the trend. From 1982 to 1983, price/discount declined from 28.5% to 17.5% as the deciding factor. Those who said quality influenced their decision rose from 5.4% in '82 to 8.9% in '83.

Interestingly, selection—which didn't even appear as a reason to shop Ward in the 1982 poll—was mentioned by 12.5% of the prospective housewares shoppers this year. This reflects positively on Ward's new housewares mix, most evident in the Ford City, Ill., store's assortment of goods keynoted by brand name products for the first time.

Sears also showed a shift away from price/discount as the primary factor motivating customers. Surprisingly, however, quality and service/repair guarantee were also down as influencing factors, though quality remained the second strongest reason customers visit Sears. Selection rose significantly from 8% in '82 to 14.4% in '83.

Unlike the reasons given for shopping the majority of retailers, prospective J. C. Penney shoppers said the No. 1 reason to shop this mass merchant was selection. From 1982 to 1983, the percentage of shoppers noting selection nearly doubled. And those mentioning price/discount as the primary rea-

Quality, selection play large role in housewares store choice

	K mart		Other discounters		Sears		Ward		Penney		Department store		Catalog showroom		Specialty store		Mail order		Factory outlet	
Deciding factor	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %	'82 %	'83 %
Price/discount	63.2	68.9	74.7	58.6	22.3	20.9	28.5	17.5	4.2	26.7	43.2	16.5	75.4	67.2	50.8	27.9	61.4	51.7	71.0	66.1
Selection	7.4	3.9	2.0	9.3	8.0	14.4	—	12.5	14.3	31.8	15.4	25.2	6.8	6.2	16.1	17.0	—	12.6	—	7.0
Quality	—	3.3	4.6	5.7	23.1	15.4	5.4	8.9	18.8	10.6	9.7	17.8	6.8	5.3	11.7	18.0	23.3	18.5	15.9	—
Satisfaction/past experience	5.7	5.2	8.7	3.9	14.8	13.1	28.7	9.6	4.3	5.0	12.8	18.3	—	7.8	2.8	12.1	—	—	—	—
Location/ convenience	18.2	15.0	13.6	15.6	13.7	14.4	18.9	22.2	—	15.7	13.5	16.2	4.8	16.2	4.4	18.9	8.8	—	—	—
Have an account there/credit	—	1.3	—	2.5	2.0	8.4	20.9	18.0	29.4	18.1	1.1	7.8	—	4.8	3.8	—	—	17.2	—	—
Service/repair guarantee	1.8	—	0.9	—	18.2	7.1	—	—	4.2	—	1.9	8.7	—	—	4.2	4.2	—	—	—	—
Reputation/ well-known	—	0.7	—	—	2.8	2.2	—	8.4	8.9	—	—	2.1	—	—	—	1.2	—	—	—	—
Other/not answering	3.7	6.7	3.3	5.1	4.7	4.1	5.8	4.9	18.7	8.1	2.4	7.6	6.2	9.1	4.9	5.7	6.5	6.9	13.1	26.9

Source: *CSA* Leo Shapiro & Associates

son rose from 4.2% to 26.7% during the same period. Factors not as important to Penney customers this year as last included quality, service and store reputation.

Price/discount as the deciding criterion for shopping K mart also increased this year over last. However, other discounters showed a decline of 16.1 percentage points.

While the importance of selection decreased in K mart store choice, quality appeared for the first time, noted by 3.3% of the shoppers. Both reasons showed added strength this year over last at all other discounters. □

Almost 2 out of 5 microwave shoppers will choose a store because of price.

Sharp prices move microwave ovens

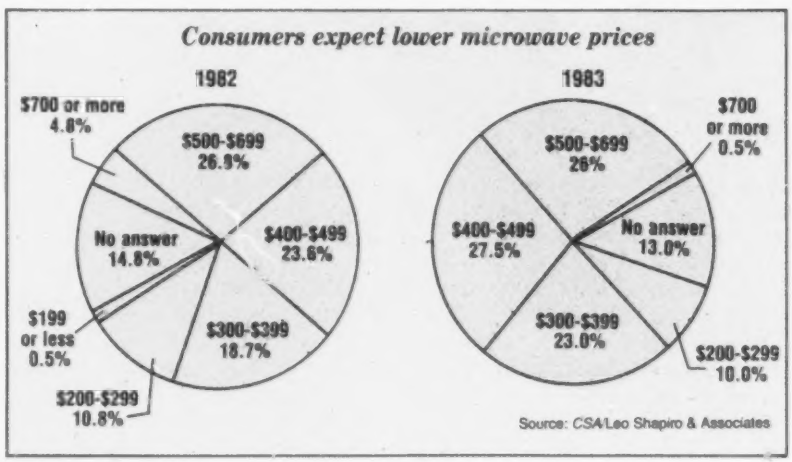
If retailers plan to sell microwave ovens, they'd better be sharp on prices and in stock on advertised brands. Contrary to the overall housewares picture, price became more important to consumers in choosing a store for microwave ovens. Additionally, this year's *CSA*/Shapiro survey shows that the category has the highest percentage of prospective housewares consumers committed to an advertised brand (55.9%), up slightly from the 1982 study (53.1%).

Intentions to buy a microwave oven have also increased this year, after having dropped off slightly between 1981 and 1982. And for every person reported buying a microwave in '83, the survey indicates a prospective buyer in '84.

However, those who are shopping for a microwave are not as active as those who were actively shopping the year before. This suggests that while consumers are more inclined to buy this year, they have not yet begun to act.

When they do start shopping, almost 2 out of every 5 will visit a store because of price—an increase of 12.2 percentage points over those mentioning price as the motivating reason to shop a store last year.

Selection and quality also gained in importance during the past year. Those consumers saying quality influences their store choice rose from 11.4% in '82 to 12.6% in '83, while those saying selection jumped 4.4% to 10.9%.



The survey also indicates that consumers' perception of the Big 3 chains as featuring low prices, quality merchandise and wide selections has grown over the past year. Shoppers named Sears, J. C. Penney and Montgomery Ward most frequently for the second year in a row as the place they would shop for microwave ovens. Of this year's group, 41.5% expressed interest in these merchants, compared with 35.4% who did last year.

Appliance stores, with their broad selections, were the second most frequently named retailers, representing 21.9% of the prospective shoppers. Discounters ranked third with 12.3%, followed by department stores with 9.5%.

Last year, when price wasn't as strong a consideration as it is this year, department stores rated as the second most popular place to look for microwaves. This was followed by appliance stores (14.6%), product specialty stores (9.9%) and discounters (8.7%).

Similarly, mass merchants snared the lion's share of actual microwave purchases in the past two years. In this year's study, more than half were made at the Big 3: Sears accounted for 33.3%, and Penney and Ward each comprised 10%. This compares with last year's 23.5%, 10.4% and 4.1% for Sears, Ward and Penney, respectively.

Again, appliance stores ranked second.

Not surprisingly, consumer expectation of price has been very realistic in the past two studies. This year, 1 out of every 2 shoppers expected to pay between $300 and $499, while 10% anticipated a lower price tag and 26.5% a higher one.

By comparison, approximately 2 out of 5 thought they would spend between $300 and $499 in '83 while 11.3% expected to spend less and 31.6% expected more.

Besides watching prices, prospective microwave consumers are brand-conscious. More than 50% of the respondents said they wanted a nationally advertised brand, and approximately 15% said they wanted a store brand. Of those specifically mentioning a brand, 20% named General Electric, 15% said Amana, 13% chose Litton and 7% named either a Kenmore or Sears. Other brands named less frequently included Tappan, Hitachi, Panasonic and Sharp. When finally purchasing, many consumers apparently switch to Sears. □

Micro cookware brands fall flat

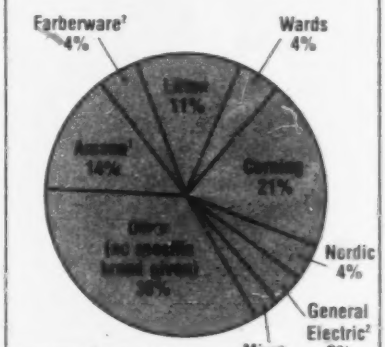
Microwave bakeware and accessories could prove to be a lucrative business for all retailers as long as consumers aren't forced to cut back on spending in 1984. The recent *CSA*/Shapiro study shows that this category provides more opportunity for higher margins since customers are significantly less interested in store or nationally advertised brands, leaving room for sales of lesser-known brands.

In fact, 2 out of every 5 shoppers polled this year were not committed to a brand. This compares with 1 out of every 3 who reported no brand preference in last year's survey.

Of those remaining respondents in 1983, 42.4% wanted a national brand, down from 54.4% in '82. Another 15.8% of this year's group preferred the store brand (15.6% last year).

Surprisingly, of all brands mentioned, two suppliers—Farberware and General Electric—aren't even in the microwave cookware business. And a third company, Amana, which was noted as the second most preferred brand, has been divesting itself of these products to a sister company, Micro 21, for the past two years.

Cookware preferences pack brand-new surprises



¹Now under Micro 21 label.
²Not a manufacturer of microwave cookware.
Source: *CSA*/Leo Shapiro & Associates

While consumer confusion is to be expected in Amana's case, perhaps the other two misconceptions can be explained by GE's strong ties to the microwave oven business and Farberware's solid presence in the cookware category. In any event, the misunderstandings point out two things: (1) Almost 1 out of every 5 shoppers who wants an advertised brand is not aware of the brands available, and (2) quality brand names from reputable housewares manufacturers stand a chance against the most popular brands, Corning and Litton (see chart).

More than one-third of shoppers polled had no idea of price. And while price/discount remained the primary consideration when choosing a store to shop at this year, consumers were less concerned with this issue and more interested in quality merchandise and wide selections.

Most consumers mentioning a price were realistic in their expectations. The majority expected to pay less than $50, and nearly half anticipated a price tag under $30. Last year's survey showed similar results. □

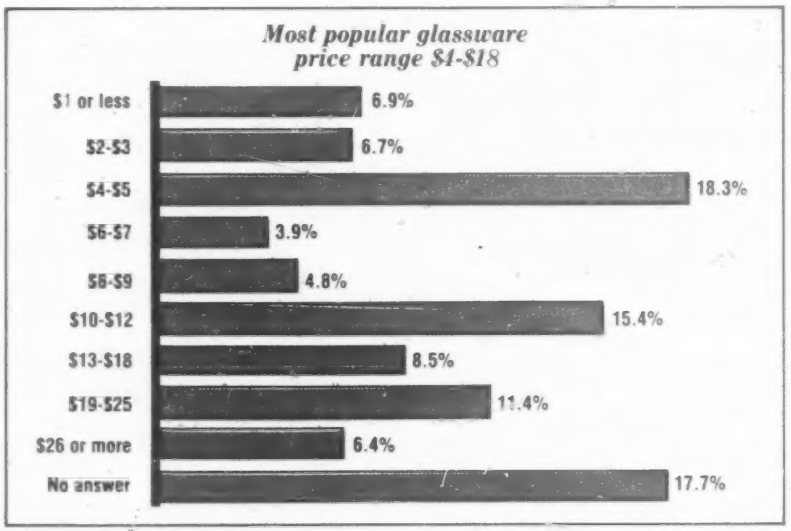
Low prices put sparkle in glassware

Low price may be the deciding factor in the sale of glassware sets, the 1983 *CSA*/Shapiro study indicates. Three times more shoppers bought some glassware in the past year than those who said they might buy in the coming year.

Considering that savers generally put money away for a rainy day and survivors live "hand to mouth," it comes as no surprise that the hedgers—those who can't decide whether to save or to spend—comprise the majority of the impulse glassware buyers. They represent 38.1%, compared to 33.3% of the total buying housewares population who are also hedgers.

Additionally, glassware is expected to be one of the least expensive purchases of all 39 hard lines products tracked in this year's sur-

Glassware is the least likely housewares purchase to be deferred.



vey, and the least likely housewares purchase to be deferred should shoppers cut back on spending. The majority of prospective glassware consumers expected to pay less than $16 for the merchandise, suggesting they planned to buy either 4- or 6-packs or promotional sets. All things considered, the price tag is a reasonable one for multiple items in today's economy.

Another 17.7% of all shoppers didn't have any idea as to price, so they would be buying the merchandise blindly. Perhaps it is these shoppers, unable to pass up relatively low prices, who account for the high percentage of impulse sales.

Accordingly, low prices and discounts are the No. 1 factor influencing where consumers will shop for glassware. Two out of every 5 shoppers said they would select a store solely on this criterion. Location/convenience was the second strongest drawing card, mentioned by 16.2% of those polled.

Discounters were named by 42.9% as the place they were most likely to shop for glassware. Of this group, K mart was mentioned by 16.3%, and 30.8% of those who actually bought did so at discounters, indicating that consumers perceive that these merchants feature glassware at the best prices.

Department stores rated as the second most likely outlet to be shopped. However, fewer respondents (15.2%) said they would shop these merchants than said K mart. The Big 3 catalog chains attracted only 9.1%. The findings were similar when it came to where consumers actually bought glassware. □

Unplanned buys may tip scale sales

Bathroom scales are low on the shopping lists of consumers for 1984. Of the 39 hard lines products tracked in this year's *CSA*/Shapiro study, this category ranked in the bottom third for prospective shoppers during the next 12 months.

The majority of consumers polled would put this purchase off should they curb family spending. This is the second most likely housewares item to be deferred (microwave ovens are No. 1). But price does not appear to be a deterrent here as it is with microwave ovens. Almost 2 out of every 3 shoppers expected to pay between $15 and $30, a relatively low price compared with microwaves with a majority range between $300 and $499. Another 10.5% of the scale shoppers anticipated lower retails and 15.7% expect higher.

Considering that consumers are more weight-, health- and exercise-conscious today than ever before, these results are surprising. They suggest that the bathroom scale market is quite saturated.

But the survey also shows that there is a small market committed to buying scales next year no matter what. In fact, for nearly every three consumers who reported purchasing a scale in the past 12 months, there was one planning to buy one during the next year.

The three most important factors influencing consumers' choice of store are (in order of priority) pricing, location and selection. Discounters, apparently, offer all three since the survey shows they were the No. 1 choice for shopping and purchasing intentions, noted by more than one-third of the respondents in each instance.

The second most shopped retailers were the Big 3 catalog chains, followed by department stores.

***Less than a third** of scale shoppers are committed to a particular brand.*

Advertised scale brands carry little weight

Category	Store brand	Advertised brand	No preference
Microwave ovens	14.2%	55.9%	29.9%
Microwave cookware	15.8	42.4	41.8
Glassware	14.2	35.1	50.7
Tea kettles	17.1	28.1	54.8
Vacuum cleaners	35.7	46.0	18.3
Bathroom scales	19.2	30.7	50.1
Place mats	16.0	22.8	61.2
Portable fans	25.4	40.0	34.6

Source: *CSA*/Leo Shapiro & Associates

However, both of these retail tiers showed difficulty in converting shoppers to buyers, suggesting their pricing or selection isn't quite right.

Brands are of little importance to bathroom scale shoppers. Unlike the shoppers of most housewares items tracked this year, less than a third of the scale consumers were committed to an advertised brand. Moreover, 1 out of every 2 shoppers had no brand preference at all. This provides retailers with an opportunity to merchandise any label they choose and still maintain sales and margins. □

Fashion sways place mat choices

Low prices and fashion may be triggering impulse sales of place mats, according to the *CSA*/Shapiro poll. As in the case of glassware, three times as many consumers bought place mats last year as those planning purchases this year, suggesting that many consumers buy these products unexpectedly.

The relatively low cost of the merchandise appears to be a key. Approximately 53% of the prospective consumers anticipated purchases to be less than $5 and more than two-thirds expected prices to be less than $12. Items in this category are the least expensive of all eight housewares subjects studied this year.

Moreover, place mat consumers potentially have more discretionary dollars than other housewares consumers. Excluding tea kettle shoppers, they have the highest percentage of two or fewer persons per household than any other housewares home.

Fashion, too, is contributing to the unexpected sales. The survey shows that 3 out of 5 place mat consumers had no brand preference. This suggests that something else —perhaps fashion—is enticing customers to the category.

Additionally, department stores, known for their fashion lines, were named by 40.4% of all place mat shoppers as the first place they'd go for this merchandise. Another 26.5% would shop discounters and 21.2% would choose the Big 3 catalog chains.

Place mat homes: two people, no kids

Category	Two or fewer persons in household	No children
Place mats	48.6%	60.5%
Tea kettles	50.9	64.2
Microwave ovens	42.3	51.4
Microwave cookware	45.0	53.5
Glassware	40.2	53.8
Vacuum cleaners	35.6	52.2
Bathroom scales	39.3	51.5
Portable fans	42.3	56.8

Source: *CSA*/Leo Shapiro & Associates

However, when it boils down to where shoppers are actually purchasing place mats, it appears the customers are disappointed in department stores and the Big 3. Department stores declined to 26.6% of past purchasers, and the Big 3 slid to 14.9%. Discounters, on the other hand, picked up slightly, rising to 29.4%.

When asked what influenced them to shop a particular store, almost as many respondents said selection as store discounts. Again this implies a concern for fashion, and differs significantly from the other housewares categories in which price was by far the leading factor. □

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***Most shoppers put a** $20 ceiling on what they would pay for smoke detectors.*

Price critical for smoke alarms

Smoke detector sales may dip noticeably next year, according to the latest *CSA*/Shapiro consumer poll. If so, this already promotional classification will become even more price-competitive—good news for discounters that have already garnered a large share of the market.

In the recent survey, more than twice as many shoppers said they purchased a smoke detector in the past year compared with those who said they might buy the home safety devices. The results, in fact, may reflect an already mature market that has reaped the benefits of local regulations requiring smoke detectors in apartments.

Price remains the most important consideration among smoke detector prospects, despite indications that satisfaction with a specific retailer is an initial factor.

Of those shoppers who might buy a smoke detector next year, 25% named Sears as a possible outlet, followed by discount stores (not including K mart) at 16.1%, hardware stores (11.8%) and K mart (10.4%). But discounters garnered a larger market share of actual purchases, according to the survey.

Almost 20% of those who bought a smoke detector named a discount store as their preferred outlet, K mart at 15% and Sears with 17.8% (more than a 40% decline in the "might buy/have bought" comparisons).

The average price shoppers expected to pay was $26, with a majority (52%) anticipating a $10-$20 price tag.

The average smoke detector shopper is a middle-low-income apartment dweller who is a prime discount store prospect. According to the survey, more than 35% are between 20 and 34 years old, 41.9% earn less than $20,000 and 39.3% have only a high school degree.

In one positive trend, a majority of smoke detector prospects said they would not delay purchasing the safety device even if forced to cut back on family spending (only 36 of the 39 products tracked enjoyed this classification by consumers).

Who's likely to buy a smoke detector

Indicator	% of polling base	% of smoke detector shoppers	% difference
Age:			
20-29	20.6	20.3	− 1.5
30-34	13.8	14.9	+ 8.0
35-39	10.5	12.7	+21.0
Income:			
Under $20,000	46.7	41.9	−10.3
$20,000-30,000	27.5	28.1	+ 2.2
Job:			
Professional	11.9	17.5	+47.1
Craftsman	10.2	11.5	+12.7
Clerical/sales	11.9	17.6	+47.9
Education:			
High school	36.7	39.3	+ 7.1
Some college	21.6	22.0	+ 1.9
College/post-graduate	23.9	26.2	+ 9.6

Source: *CSA*/Leo Shapiro & Associates

And despite the shrinking market, retailers have the opportunity to tap this safety-conscious shopper by piggybacking smoke detectors onto other home protection devices and merchandising the products in a total package. For nondiscounters, this may be an alternative to strictly promotional price-cutting. Sears, for one, is already merchandising home safety equipment such as safety ladders, fire extinguishers and alarms in a gondola run. □

Sears dominates garage openers

Chicago-based Sears has few peers among retailers of garage door openers and should maintain its grip throughout 1984, according to the *CSA*/Shapiro consumer survey.

More than 47% of garage opener prospects said they would purchase the product at Sears. Hardware stores were a distant second at 13.1%, followed by specialty outlets (8.6%). Of those who had already purchased a garage door opener, 53.8% named Sears, followed by the garage sale/private party classification (10.3%).

Garage opener prospects cited low prices as the most important criterion for choosing a retailer, but

selection and quality—characteristics consumers often attach to Sears' hard lines—were also primary requirements (22.5%).

Unlike shoppers of many products in the 39 hard lines consumer poll, garage opener prospects were ambivalent about advertised brand merchandise. More than 27% named a store brand when asked which brand they would purchase—the second highest percentage among products tracked in the survey. Another 29.6% said they had no brand preference—a prime opportunity for Sears and other store brand retailers to beef up sales.

Not surprisingly, the garage opener shopper is an affluent homeowner. Almost 53% of the prospects earn more than $30,000 annually (vs. 25% of the polling base), while 1 out of 4 earns more than $40,000 a year. More than 36% hold either professional or managerial jobs (compared with 25.8% of the sample), and 35.6% are between 45 and 59 years old.

Garage door opener shopper: older, more affluent

Indicator	% of polling base	% of garage shoppers	% difference
Age:			
30-34	13.8	18.5	+ 34.1
45-59	21.5	35.6	+ 65.6
Income:			
$30,000+	25.0	52.9	+111.6
Children:			
1 to 2 children	33.2	32.7	– 1.5
6-17 years old	38.8	40.3	+ 3.9
Job:			
Professional/ manager	25.8	36.3	+ 40.7
Sales	6.1	10.5	+ 72.1

Source: CSA/Leo Shapiro & Associates

Shoppers are somewhat confused about how much a garage door opener would cost. One out of 5 polled refused to speculate, while those who answered named amounts ranging from a low of $36 to as much as $400. More than 66% (85.1% of all who answered) said they would expect to pay from $100 to $299. The average price named was $185.

As with other high-income groups, these shoppers are more optimistic about their financial future. While 64.5% said they would delay their garage opener purchase if forced to cut back family spending, it appears that few of the group will slash expenses next year. In fact, 54.1% said they expected their income to increase in the next 12 months (compared with 45% of the polling base) and believe it will also be easier to meet expenses. And a majority—more than 53% (compared with the 46.5% polling base)—believe it's an opportune time to purchase a high-ticket item.

But unless GMers are more aggressive in this classification, Sears is likely to dominate the market with its strong selection and reputation for service and quality. Retailers cannot depend solely on advertised brands and low prices to exploit this market. □

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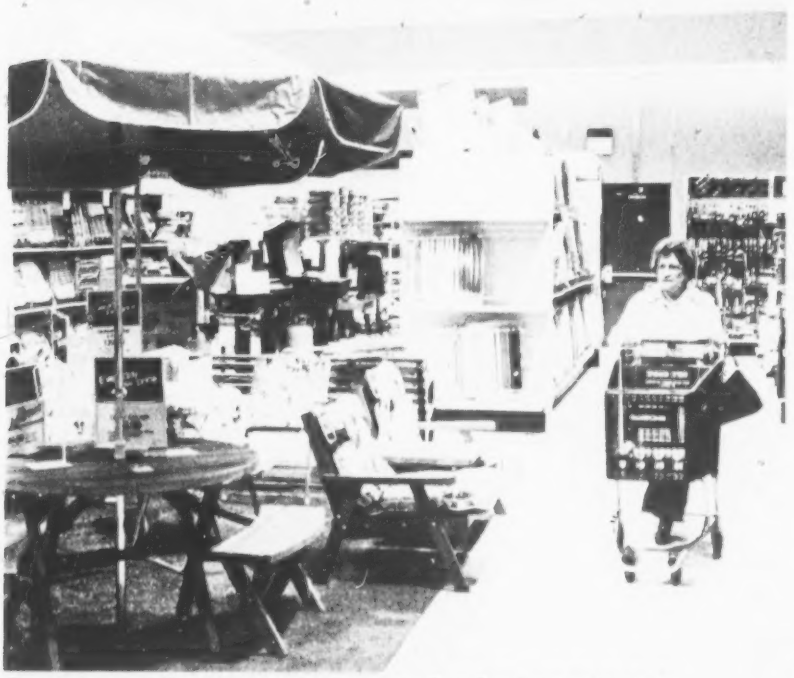
Quality key for patio furniture



***Consumers put** the average price for an outdoor furniture set at $360.*

When consumers begin to search for a set of patio furniture, price is the initial criterion, and shoppers often flock to their local discounter. But many of them are soon siphoned off to department stores and specialty outlets as quality and selection also become important considerations—standards many discounters fail to meet in this lawn and garden classification.

This trend appears in the latest *CSA*/Shapiro consumer poll. For example, 29.6% of those shoppers who said they might buy patio furniture in the coming year named a discounter as their preferred outlet, followed by specialty stores (22.3%), Sears (14.4%) and full-line department stores (10.2%).

Those who already purchased patio furniture, however, painted a different picture. More than 18% said they had bought patio furniture at department stores and another 33.3% at a specialty outlet; 9.1% even named flea markets. Shoppers naming discounters dropped from a 29.6% intention to 9.1% actual purchase—a 69.3% decline.

Product value, not just price, may be the reason, according to *CSA*/Shapiro results.

While price is primary (27.2%), shoppers also said quality (12.8%) and selection (11.5%) were important considerations when choosing a specific retail outlet.

High-income families biggest buyers of outdoor furniture

Indicator	% of polling base	% of patio furniture shoppers	% difference
Size of family:			
3 to 4	39.9	44.5	+11.5
Family income:			
$30,000+	25.9	46.3	+81.2
Chief breadwinner's job:			
Professional	11.9	14.3	+20.2
Manager	13.9	17.6	+26.6
Sales/ craftsman/ operative	26.2	35.2	+34.4
Education:			
College/post-graduate	23.9	31.0	+29.7
Financial status:			
Easier to get by than last year	27.1	42.6	+57.3

Source: *CSA* Leo Shapiro & Associates

The demographic profile of patio furniture shoppers supports the product value trend. These shoppers are more affluent and better-educated than the average consumer and are more willing to delay a purchase until they have enough money to buy exactly what they want. Almost 75% of those asked said they would delay buying a patio furniture set if they were forced to reduce expenses.

More than 31% of these prospects hold either professional or managerial jobs (compared with the 25.8% polling base average), earn more than $30,000 annually and have either a college or post-graduate degree. They also have a good idea what they might pay for a set (about $360)—only 1 out of 5 did not name a price range. Almost 29% said they would expect to pay between $300 and $700 for a set, while another 24% said they would pay between $150 and $300. □

Gas-operated grills catch on

America's love affair with the charcoal briquet may be coming to an end. Retailers this year have reported strong sales for gas-operated barbecue grills, a trend that has been tracked by recent *CSA*/Shapiro consumer polls.

More shoppers are willing to pay premium prices for barbecue grills. In the 1983 *CSA*/Shapiro survey, 14.5% of those in the market for a barbecue grill said they would pay between $99 and $150 (a popular price range for gas grills)—a whopping 208.5% increase over the 1981 poll. Another 21.8% said they would pay more than $150 for an outdoor grill (vs. 9.3% in '81). Average expected price rose to $106 from $81 last year.

The higher price points may also signal a market share shift from the traditional low-price grill outlets (discounters and drug stores, for example) to the likes of Sears, which heavily depends on quality and selection perceptions rather than the lowest price to attract shoppers.

A small but revealing shift ap-

***Close to 20% of respondents** expressed a preference for store brand barbecues.*

Trend shifts to higher-price grills

Price expectations	$10-$30	$30-$99	$100-$149	$150+	Other	N/A
1981	12.5%	26.0%	4.7%	9.3%	2.1%	45.4%
1982	17.1	31.9	7.3	16.6	0.8	26.3
1983	18.7	33.3	14.5	21.8	0.3	11.4
% change 1981 to 1983	+49.6	+28.1	+209.5	+134.4	—	—

Source: *CSA*/Leo Shapiro & Associates

peared in the 1983 survey results. Shoppers in both the "had bought" and "might buy" classifications were asked at which store they purchased or would purchase a barbecue grill.

Of those who had already purchased a grill, 8.3% named Sears. But 18.1% mentioned Sears when asked where they would consider buying a grill—a 118.1% increase. The big losers in the "had bought/might buy" shift were drug stores (9.4% to 2%), catalog showrooms (10.4% to 4.8%) and department stores (11.5% to 8.5%).

Discounters, the most popular barbecue grill outlet, increased their potential share, but the results from the store brand/ad brand preference survey may be a warning for retailers who grab market share through low-price name brand grills.

Almost 19% of shoppers in the market for a barbecue grill said they would prefer a store brand, while another 43.2% said they had no brand preference—a potential market for house brand retailers such as Sears. And for those who named the advertised brand, 43.7% said they would "definitely" consider a store brand if given the option. □

GMers hang on to bug killer market

In 1981 retailers were plagued by product returns when the starter motors in ultraviolet bug killers suffered blowout problems. The malfunctions were corrected, manufacturers claimed, but GMers were still in danger of losing a significant share of the insect zapper market to specialty hardware stores—outlets where consumers felt they would receive speedy service in the event of mechanical failures.

But despite indications shoppers would take their business elsewhere, consumers continued to buy bug killers at GM chains.

Last year, 21.5% of prospective consumers named hardware stores as their preferred retail outlet, according to the 1982 *CSA*/Shapiro consumer poll. But in following through, only 2.4% of those asked this year said they had bought a zapper at a hardware store.

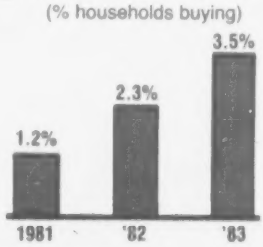
Shoppers were apparently so confident of the product's mechanical reliability that they began purchasing bug killers by mail order. In 1982, only 3.9% of those who said they might buy a zapper named mail order as a retail source. In the 1983 survey, 17.1% said they had bought a bug killer by mail order. As for chains, almost 30% of shoppers polled said they had bought a zapper at Sears, followed by discounters at 14.6%.

Home improvement centers showed strength among bug zapper prospects. Of those who said they might buy an ultraviolet killer in the coming year, 14.3% named home centers as their preferred outlet. (Of those who had bought bug zappers, only 4.9% named home improvement chains.)

Shoppers this year said they'd be willing to pay an average of $71 for the product, compared with $78 last year. And while 68.1% of the 1983 prospects said they would delay their purchase in the event of family expense cutbacks, 55.6% expect their income to increase in the next 12 months (compared with a 45% polling base average). □

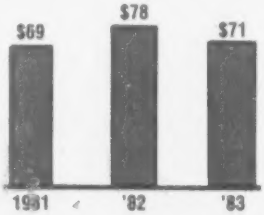
Bug killers in more households

(% households buying)



Source: *CSA*/Leo Shapiro & Associates

Bug killer prices stable



Source: *CSA*/Leo Shapiro & Associates

***Family interest** in a home computer increased with total family income.*

Computers set CE sales pace

If any retailer was in doubt about the strength of consumer demand for home computers, this year's *CSA*/Shapiro survey should set him straight. Nearly six million families said they might buy a computer in 1984, a tremendous 218.2% increase over this year.

Even better news for chain buyers is that the number of actual purchasers is far surpassing those who expressed interest in the past. Last year, 2.2% of survey respondents said they might buy a computer in '83. In fact, more than twice as many (4.6%) bought a unit.

Retailers stocking inexpensive home computers have reported exceptionally strong sales gains throughout '83. They say the steep decline in prices for the home models is the single most important factor prompting sales, followed closely by the constant barrage of publicity aimed at the public.

Despite the steady stream of price-oriented advertising, consumers still think of a home computer as an expensive item. While respondents to this year's survey said they expected to spend an average of $888 for a computer, down from $1,137 last year, most home computers are selling below $300, and complete systems are available for less than $700.

Though some broadening of the consumer base for home computers is apparent, the majority of potential purchasers are still in the better-educated and more affluent segments of the population.

The mean income reported by those who purchased a computer this year or planned on buying in '84 was $29,300. While family interest in a home computer increased with total family income, even those earning less than $20,000 are a good potential market.

More than 1 in 4 (26.3%) actual or potential purchasers of a home computer has a family income below the $20,000 mark, up 9.4% compared to 1982's study. The biggest gain came from families reporting incomes in the $15,000-$20,000 range. These people will make up 15.5% of all home computer consumers, close to their 18.3% of the total population.

Education as a factor in the home computer customer profile stabilized this year, with demand increasing steadily from people who completed more schooling. Compared to their segment of the general population, nearly one-third more of those who attended but did not graduate from college bought or planned to buy a computer. Fifty per cent more college graduates were computer shoppers, and more than twice as many of those with graduate studies were in the market for a computer for their homes, compared to their respective national bases.

Potential sales by region also shifted this year. While the Mountain and Pacific states continued to show a greater number of potential or actual purchasers compared to their segment of the national population, two-thirds more of those living in the West North Central and South Atlantic regions said they had purchased or were considering the purchase of a computer; a year ago computer purchasers represented slightly less than their portion of the population in these areas. □

GMers gain as home computer outlets

Type of store	% of shoppers			% change (1981 to 1983)
	1981	1982	1983	
K mart	0.9	11.0	4.7	+422.2
Other discounter	19.1	8.9	14.0	– 26.7
Sears	4.6	4.1	2.3	– 50.0
Ward	2.1	1.4	9.3	+342.9
Penney	1.6	3.4	4.7	+193.8
Department store	13.1	7.5	0.0	–100.0
Catalog showroom	6.3	5.5	4.7	– 25.4
Electronics specialist	25.1	39.7	30.2	+ 20.3
Computer store	5.6	7.5	27.9	+398.2
Other	21.6	11.0	2.2	– 89.8

Source: *CSA*/Lec Shapiro & Associates

Turmoil in the marketplace

Mass confusion is running rampant throughout the market for home computers. Manufacturers, many of which posted losses in the hundreds of millions of dollars this year, are reconsidering their positioning in the marketplace. Retailers are desperately searching for the right mix. And confused consumers, who are being bombarded from all sides with home computer advertising, are demonstrating all the symptoms of shell shock.

Although demand for the home microprocessors is skyrocketing, shoppers have failed to channel their preferences into any coherent brand loyalty. According to the *CSA*/Shapiro study, 7 out of 10 potential purchasers said they planned to buy an advertised brand of computer. But when it came to naming the brand they wanted, only Apple chalked up a respectable score, 37%. Commodore came in second with 1 consumer in 8 citing it as the brand he planned to purchase. No other company garnered more than 9% of shoppers.

Atari, far and away the leader in video game brand recognition, was named by only 7% of shoppers as the computer they preferred. Radio Shack, in spite of the company's national scope, was picked by only 1% of potential home computer purchasers.

Both Texas Instruments and IBM earned 9% of the customer base. But Texas Instruments has since announced it will drop out of the home computer business, and IBM's PCjr, unveiled in November and not destined for the mass market at all, won't even be available for sale through specialty stores until early next year.

Coleco's Adam, at roughly $700 the best price/value home computer package in the mass market, has yet to win a customer franchise. Production problems have allowed only a limited number of the systems into retail distribution (estimates range from 200,000 to 350,000, well below Coleco's original projections of 400,000-500,000).

Analysts say the arrival of the IBM PCjr may signal the beginning of a relatively stable home market, but none expect that stability to occur for at least another 18 months to two years. And they warn that more major computer manufacturers are going to get out of the business.

Most shoppers plan to pay under $125 for software

Price	% who plan to spend
$25 or less	12.0%
$26-$30	9.9%
$31-$35	2.0%
$36-$50	6.9%
$51-$124	6.0%
$125-$199	1.0%
$200-$299	7.9%
$300-$399	2.0%
$400-$499	4.0%
$500 or more	20.6%
Don't know	27.7%

Source: *CSA*/Leo Shapiro & Associates

Software shoppers pick specialty stores

Software programs may be the "blades" for the home computer "razor," but 3 out of 4 consumers in the *CSA*/Shapiro study said they would delay a program purchase if they curbed their spending.

However, retailers should not expect any slowing in sales next year as software shoppers are the most affluent and optimistic in the country.

Compared to the general population, twice as many potential purchasers reported family incomes above $30,000. The mean income was $31,100, the highest figure for any group of shoppers in the survey.

And when asked if they expected the economy to get better in 1984, 70.6% of potential program purchasers said yes, compared to only 55.1% of the general population.

While the sales potential for software is tremendous, general merchandise chains don't appear to be favored outlets. Nearly 2 out of 3 (63.8%) said they would go to a computer or electronics store, while only 22.8% of potential buyers named GM chains. This may give retailers pause to reconsider the often cited assumption that consumers return to the store where they bought their computers when they need software. Selection and previous satisfaction are more important for software than for computer purchases.

Full-line department stores fared the worst, with only 2.4% of shoppers saying they would buy software there. Even among those who actually bought home software this year, only 2.3% went to a department store. □

'Game over' signal for home video?

Demand for home video game consoles may drop off more than 40% next year, according to the *CSA*/Shapiro study.

Only 3.1% of consumers said they might buy a game console in 1984, compared to 5.3% who indicated they would buy last year. Spurred by price cuts, actual purchases hit 10.8% of households surveyed.

The steep drop-off in demand is being prompted by the dramatic decline in the price of home computers and a general waning of interest in game-playing by teenage boys, the largest consuming audience.

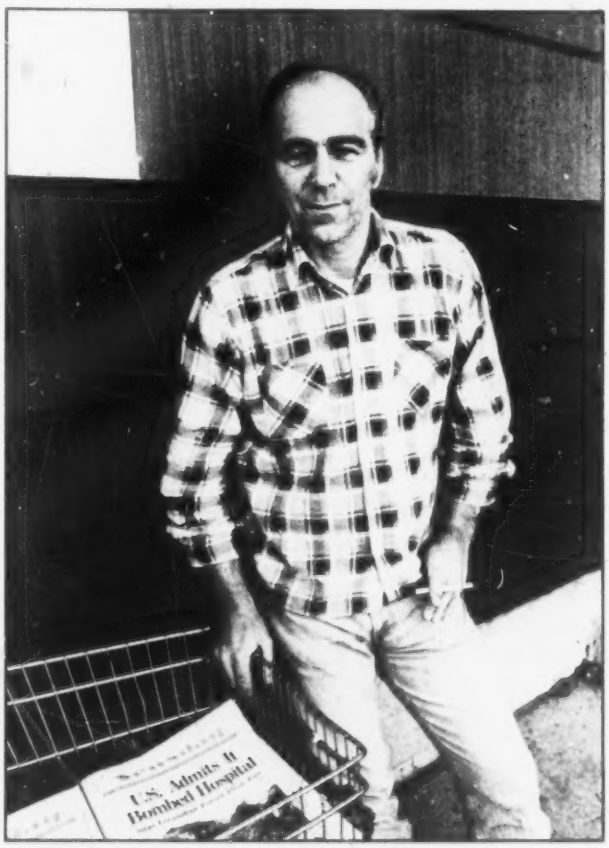
Unlike other products where actual purchases outstripped expectations, retailers agree that this Christmas will be the last season for the "game only" microcomputers.

Despite price cuts for game consoles bringing the cost of an Atari 2600, for example, down to about $60, shoppers are well aware that for a very few dollars more, they can purchase a home computer that will not only play the same or even bet-

George Herdst: surviving the hard way

The word survivor was invented for guys like George Herdst. At 44, the Centereach, L.I., resident hasn't worked in more than two years, the victim of a psychological disorder called agoraphobia. Nevertheless, Herdst and his wife have managed to raise two teenage children and pay their monthly mortgage on less than $15,000 a year. They cut corners, shop sales and keep hoping the former New York City sanitation worker can find a part-time job to supplement his meager medical pension.

But Herdst's misfortunes began long before his nervous condition and the nation's latest bout with economic adversity. "Things started to go down for me in 1975," he explains. "That's when the New York City fiscal crisis began, and I worked for the sanitation department. People were laid off and hired back again. But ever since 1975 there was the threat 'You're going to be laid off, you're going to be laid off.' You had to always live under that."



By buying only necessities, *shopping sales and avoiding credit card debts, Herdst just manages to make ends meet.*

Herdst was finally sidelined by agoraphobia (he can no longer afford the treatments, which were abruptly halted last June). Although he ventures out on short neighborhood journeys, he is the victim of severe anxiety attacks during extended trips outside his home. The disorder even prevents him from visiting a local social security office to apply for disability benefits.

His money problems were so bad last year that Herdst's wife, who hadn't worked in 16 years, was forced to find a part-time minimum-wage job in a packing company.

But the Herdsts have survived. They buy groceries with double-discount coupons, often wear homemade clothes and shop basic general merchandise stores such as the New York-based discounter Times Square Stores (TSS) and Sears. Department stores might as well be museums as far as the Herdsts are concerned. "TSS is basically for clothes, and my wife buys materials there," Herdst says. "Sears is strictly for automotive, garden equipment and some clothes."

They also shop sales, especially at Sears. "Basically we shop Sears for sales because they're so overpriced that it's not even funny," Herdst says. "Of course, with a lot of their stuff they give you guarantees, like their tools. The quality is good and they stand by their product. But it's overpriced."

Both Herdst and his wife are self-service shoppers who demand only a quick exit at the checkout counter. Store employees, they believe, make little effort to help the customers. "They feel, 'Here's the stuff—if you like it, buy it. If you don't, forget it,'" says Herdst. "But it's not so much that you want help in the stores. It's when you're checking out and you don't want to spend 15 minutes in the line. You want to buy what you're going to buy and get out of the store."

Despite their money woes, the Herdsts avoid heavy credit card debts. They have Visa and Sears cards, both of which are kept below a $500 balance. "I don't go crazy with charges," says Herdst. "You're taking your own money out of your pocket with the interest. I haven't used the Sears card in almost two years."

Credit or cash, Herdst has no plans to make a major household purchase. He can't afford it. In fact, a three-year-old television set is the result of the last family spending spree. "The only thing I would buy in the next year, if I'm working, is something out of necessity," he says.

But don't ask him where the money would come from to replace a malfunctioning refrigertor. He doesn't know. Even with his wife's part-time job, there won't be enough money to cover the family bills next year, and they have no savings account.

ter versions of popular arcade games, but will give them the expanded capabilities of a home computer as well.

Whether or not to continue to stock video game machines is a thorny question for GM retailers. If sales match the 3.1% of shoppers who said they might buy one, more than 2.6 million units will be sold in 1984. And the bulk of these purchases will be made at GM outlets. Three out of 4 potential purchasers said they would probably go to either Sears-Penney-Ward (32.7%), a discounter (27.2%) or a full-line department store (15%).

One solution may be for the GMers to carry video game consoles like ColecoVision that are designed to be easily expanded into full-function home computers. But industry insiders note that the game machine must be designed to become a computer. A variety of keyboard add-ons built for the Atari 2600 were highly touted at this year's Consumer Electronics Shows, but those that reached the market failed to develop virtually any following. □

Game cartridges ride roller coaster

More than 80 million game cartridges were sold this year, but price-cutting and incredibly stiff competition among retailers kept dollar volume equal to 1982's $1.5 billion.

And the business isn't going to be any better next year. Consumers, mainly boys 11 to 17 years old, aren't buying new games the way they did in 1982, nor are they visiting the video arcades in the same numbers. At least 2,000 of the 10,000 arcades open in 1982 have been shuttered, and Wall Streeters are saying that an additional 2,000 will probably close in the next few years.

The one bright light in the home entertainment business is the spectacular growth posted by game cartridges and programs designed for home computers. Unit volume increased by 159.4% to 16.6 million, while sales in dollars nearly tripled to $425 million in 1983.

During the same period, actual sales of dedicated game machines dropped to $640 million and 5.3 million units, compared to sales in 1982 of $1.3 billion and 7.8 million units, according to the Boston-based Yankee Group. □

Phone sales pass 11 million units

Sales of telephones skyrocketed to new heights this year, and industry insiders say 1984 will be even better. More than four times as many consumers said they might buy a telephone in the coming year as said they were interested a year ago—the largest increase, at 336%, of any product tracked.

Even more heartening news to GM chain retailers is the fact that actual sales outstripped intentions by 452%. Should the pattern continue into '84, nearly half of all households will buy a phone next year.

A telephone specialty store was named by 74% of respondents as their most likely shopping outlet, compared to only 20.3% who named any GM store. Of those who bought in '83, 65.2% patronized a specialty store—down considerably from the 83.7% of a year ago. Discounters and department stores increased shares by 11.7 and 6 percentage points, respectively.

One tack taken by GMers has been the opening of franchised departments in their stores. Sears and a number of department stores have put Bell Phone Centers in their outlets this year, and some discount chains, like Bradlees, are experimenting with a trimmed-down version called the Phone Booth. Consumer interest in shopping a GM outlet for a telephone increased by one-quarter this year, vs. the 16.1% of a year ago.

Despite the highly publicized breakup of the Bell System and the intensely competitive stance taken by virtually every tier of retailing, there is still a large group of shoppers who, while expressing interest in buying a telephone, have no idea of where they will shop. Nearly a quarter (22.8%) of potential purchasers expressed no store preference, up slightly from the 20.4% of shoppers who had no store preference in last year's survey, but down considerably from 1981's 40.9%.

Shoppers also are getting a more concrete idea of telephone pricing. A year ago, survey respondents said they expected to pay an aver-

***Consumer interest in buying** a phone at a GM store increased this year.*

Shoppers still seek high-priced phones

	% of shoppers		
Price expected to pay	1981	1982	1983
Under $10	0.0	0.0	0.0
$10-$20.99	0.0	2.8	6.0
$21-$25.99	0.8	4.1	9.4
$26-$30.99	0.9	8.0	8.2
$31-$50.99	8.9	24.8	25.7
$51-$99.99	18.5	19.8	14.7
$100-$149.99	9.4	13.1	15.0
$150-$199.99	6.0	2.8	3.0
Over $200	1.2	3.7	2.5
Don't know	54.3	20.9	15.5
Average	$87	$91	$67

Source: *CSA* Leo Shapiro & Associates

age of $91 for an instrument. This year's spending expectations dropped 26.4% to $67.

The high-end/low-end split in spending expectations continues to widen this year. Nearly 1 in 4 consumers (23.6%) said they would spend less than $30 for a telephone in 1984, compared to 14.9% a year ago and only 1.7% in 1981. Price expectations at the high end of the home market also increased this year, with 18% of potential shoppers saying they planned to spend between $100 and $200 for a telephone, up from 15.9% a year ago. □

Mixed signals for phone answerers

On the surface, the sales future for telephone answering devices looks rosy, with more than twice as many consumers saying they may buy a unit in 1984 compared to those who said they were potential purchasers a year ago.

In fact, the 2.7% of respondents in the *CSA*/Shapiro study who said they might buy a machine in '84 matches the 2.7% who said they bought one in 1983.

Nevertheless, the retail market may be in for a jolt. The number of people who bought an answering machine from another person, a garage sale or a flea market is nearly four times higher than it was in 1982.

More than 1 shopper in 10 (10.3%) bought a second hand answering machine this year. This "market share" is equal to that of catalog showrooms and higher than any other retail tier except full-line department stores (13.2%), telephone specialty stores (17.6%) and electronics stores (22.1%).

While demand is still relatively strong, the dramatic increase in private sales may mean past purchasers are finding the devices are not as useful as they were initially thought to be.

Looking ahead to '84, 45.9% of shoppers who named a store picked a general merchandise outlet, only 1.7% below those who cited a specialist as their expected place to shop.

Sears is the preferred store with 11.6% of potential purchasers saying they expect to go to the mass merchandiser, virtually identical to the number of shoppers who named the nation's largest retailer last year.

Discount stores were named by 16.3% of shoppers, up from 7.1% in the '82 study. Full-line department stores were named by fewer than 1 shopper in 10 (9.3%), down 29.5% compared to consumers who actually bought a unit at a department store this year.

One encouraging sign is the apparent broadening of the potential customer base. A year ago, more than two-thirds (67.5%) of buyers and shoppers had no children in their households. This year's study notes that this number has dropped to just over half (53.8%). □

'Walkman' demand soars 40% for '84

Consumer demand for personal portable stereo players is skyrocketing, particularly in trend-lagging parts of the country.

During 1984, 2.8% of respondents in the *CSA*/Shapiro survey plan on buying one of the mini players, compared to 2% of respondents a year ago.

But the number of consumers who actually bought a player this year was five times higher than those who thought they might buy one. While most products show a higher number of actual purchases

***Sony has been copied** many times over, but 53% still want the original.*

compared to those who planned on buying, only telephones, with a five and a half times higher ratio, beat personal portable stereos. The sales realization came without the boost given telephones by the breakup of the Bell System.

Consumers are extremely brand-conscious when it comes to players. Nearly 7 out of 10 shoppers (69.7%) said they would buy an advertised brand, and 7.6% of potential purchasers said they were considering a store brand. Only 22.7% of shoppers said they had no brand preference, the seventh lowest rating of any hard lines product in the survey.

Despite the myriad of manufacturers who have copied the original personal portable, Sony's Walkman, shoppers overwhelmingly said they wanted a Sony. More than half of potential purchasers (53%) named Sony. Panasonic placed second, with a mere 7% mention. No other brand even rated 5% potential purchaser interest. And the high-

Price and quality: keys to store selection for stereos

Reason to shop a store	% of respondents shopping		% change ('82 to '83)
	1982	1983	
Price/discount	34.1	39.3	+15.2
Quality	8.7	11.2	+28.7
Selection	7.3	10.1	+38.4
Past satisfaction	9.0	5.2	−42.2
Convenient location	6.0	5.4	−10.0
Other	12.1	12.6	+ 4.1
Not answering	22.8	16.2	−28.9

Source: *CSA*/Leo Shapiro & Associates

est-rated unit, according to Consumer Reports, Aiwa's HSPO2, was mentioned by no shoppers as the unit they were planning to buy.

Demand for the units is up in every region in the country except the mid-Atlantic, Pacific and Mountain areas. In these trend-setting sections of the country, the market has been saturated over the past few years.

Surprisingly, the average amount consumers expect to spend is only $4 less than last year's $125. Only 1 shopper in 4 plans to spend between $50 and $100, the price range for virtually all of the full-featured units on the market today. □

VCR's heat up after '83 downturn

Following the recession-driven slowdown in sales in late 1982 and the first quarter of '83, consumer demand for video cassette recorders is soaring again.

The 3.9% of *CSA*/Shapiro survey respondents who said they might buy a VCR next year shows a 56% stronger demand than last year's study. This follows on the heels of a 21.9% drop in demand in '82.

Actual purchases have followed the same pattern, with 4.6% of survey respondents saying they bought a VCR this year—nearly three times as many as said they purchased a unit a year ago.

An even more encouraging trend is the faster pace of actual purchases compared to potential ones—1983 was the first year more people bought a VCR than planned on buying one. Nearly twice as many shoppers bought a VCR this year than said they expected to buy in the 1982 survey.

If this trend continues—and all indicators point in that direction—actual sales will increasingly outstrip potential purchases. *CSA* predicts that between 7% and 10% of families will buy a VCR in 1984.

And nearly half of the estimated 6-10 million VCR sales predicted for

Price expectations tumbling for VCR's

Price	% of shoppers			% change (1982 to 1984)
	1982	1983	1984	
Under $300	0.0	5.3	10.3	—
$300-$399	3.4	6.1	5.3	+ 55.9
$400-$499	1.5	4.6	6.9	+360.0
$500-$699	8.8	19.9	25.7	+192.0
$700-$899	13.4	21.4	17.9	+ 33.6
Over $900	17.0	18.0	14.2	– 16.5
Don't know	55.9	24.7	19.7	– 64.8
Average	$760	$728	$651	– 14.4

Source: *CSA*/Leo Shapiro & Associates

next year will move through general merchandise chains. Exactly 45% of potential purchases said they would most likely go to a general merchandise chain to buy a VCR, compared to only 36.7% who said they would go to a GM chain in the 1982 survey.

Price was the major reason for selecting the type of outlet, cited by more than a third of shoppers who gave a reason (36.1%).

The consumer emphasis on price is also reflected in the amount prospective purchasers said they expected to spend. The average price quoted this year was $651, more than 10% below last year's $728. □

VCR tapes get commodity status

Blank video cassette tapes are a commodity item, and consumers are looking for a low price and conveniently located store when they shop for them.

Nearly half (48.5%) of potential blank cassette buyers said price and discount were the reasons they picked the store they shopped. General merchandise chains were the preferred source of blank cassettes for just over half the surveyed shoppers, while 1 in 3 named a discount outlet, with K mart alone being picked by 11% of shoppers. Sears was distant second with 6.4% of the potential market.

Because of the commodity nature of VCR blanks, only 5.9% of potential purchasers said selection was important in their decision to go to a particular store.

Most shoppers (56.2%) planned to buy an advertised brand, while only 8.2% said they would buy a store's own brand. Slightly more than a third had no preference.

But when asked specifically what brand they would buy, only two names were mentioned by more than 1 consumer in 10: Sony (13%) and TDK (11%). Scotch and Memorex each registered 9%. □

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In the growing lens/shutter market, *35mm models should re-emerge as a growth category in GM camera departments.*

Auto cameras spark 35mm sales

The 35mm single lens reflex (SLR) market has flattened out, photo industry observers say, but the category has managed to grow on the strength of the lens/shutter 35mm models that include automatic focus and exposure capabilities. Some GMers, in fact, have reacted to this trend by trimming SLR lines while beefing up auto-focus selections.

The shift is reflected in the *CSA*/Shapiro consumer polls. The surveys, conducted annually since 1981, reveal that more 35mm prospects expect to pay lower lens/shutter prices. (The surveys do not differentiate between an SLR and lens/shutter camera.)

Lens/shutter manufacturers' shipments have increased significantly, according to the Wolfman Report on the American photo industry. In 1979, 400,000 lens/shutter units were shipped, compared with an estimated 1 million units in 1982—a 150% increase.

Consumers' price expectations followed suit, the *CSA*/Shapiro surveys show. In 1981, 8.2% of shoppers polled said they would expect to pay between $50 and $149 for a 35mm camera (a popular price range for the lens/shutter models). But in the current survey, 16.5% said they would pay between $50 and $149—more than a 100% change.

Current camera prospects clearly have a better grip on prices and models they plan to purchase. In 1981, 45.5% of those asked said they had no idea what to pay for a 35mm camera, compared with only 7.6% in the 1983 survey.

But 35mm prospects haven't abandoned their favorite retail outlets. More than 35% named a camera specialty store, followed by discounters (including K mart at 8.6%) and catalog showrooms at 11.4%. Within the "have bought" category, catalog showrooms tripled their share of the 35mm market from 1981 to 1983.

Price is the most important factor in the 35mm prospects' retail outlet decision, according to survey results. The response, however, may be more a value perception than a choice based on lowest price. Traditionally, photo specialty shops have deftly combined low prices with service to dominate the 35mm market. But with the emergence of the lens/shutter lines (less service-intensive cameras), GMers may have an opportunity to chip away at the dominant specialty stores.

The 35mm camera shopper expects to pay more

Indicator	1981	1982	1983	% change 1981-83
Price expectations				
$50-$149	8.2%	8.0%	16.5%	+101.2
$150-$299	31.1	36.3	44.4	+ 42.8
$300+	14.0	34.7	25.6	+ 82.9
Other	1.0	2.8	5.9	—
Not answering	45.7	18.2	7.6	—
Income:				
Under $20,000	35.1	24.3	31.3	- 10.8
$20,000-$30,000	32.9	31.1	34.7	+ 5.5
$30,000-$40,000	13.7	15.9	18.6	+ 35.8
$40,000+	18.3	21.2	15.4	- 15.8
Not answering	—	7.5	—	—

Source: *CSA*/Leo Shapiro & Associates

Be it SLR or lens/shutter, national brands rule the roost: 35mm prospects overwhelmingly (83%) preferred name brands when compared with private label brands—bad news for Sears and other retailers that sell private label 35mm lines.

If the 1982-83 results are any indication, it could be a good year for 35mm retailers: Twice as many shoppers in '83 purchased 35mm cameras as had originally anticipated doing so. □

Instants face another bleak year

It's no secret that the instant picture camera industry is having problems. Manufacturer shipments have declined 45.1% from 8.2 million units in 1978 to an estimated 4.5 million units in 1982, according to the Wolfman Report on the United States photo industry.

There may be even more problems ahead. The 1983 *CSA*/Shapiro consumer poll shows little interest in the product among shoppers (33rd, in fact, among the 39 hard lines products tracked).

For retailers, that means little hope for growth in the category save aggressive price promotions—more than 40% of those instant camera prospects said price was the single most important factor in their shopping formula. Just under 10% named selection, a distant second, as a reason for shopping at a particular outlet.

As expected, discounters were the most popular retail outlets. More than 38% named a discounter (including 14.3% for K mart), followed by specialty camera shops (26.7%) and full-line department stores (8.8%). About 38% of those prospects said they would expect to pay between $36 and $99 for an instant camera, while another 16.9% said they would expect to pay less than $30.

Of those who had bought an instant camera in the past year, 11.7% named a catalog showroom, while specialty shops dropped to 13.1%—a further indication that price is the key factor in instant camera sales (it's also a product that requires little if any service).

Instant camera shoppers hold nonprofessional jobs

Indicator	% of polling base	% of instant shoppers	% difference
Job:			
Sales/clerical	11.9	21.1	+77.3
Manager	13.9	14.8	+ 6.5
Craftsman	10.2	11.7	+14.7
Professional	11.9	8.8	−26.1
Income:			
$15,000-20,000	31.0	28.5	− 8.1
$20,000-30,000	27.5	34.2	+24.4
$30,000-40,000	13.2	15.0	+13.6
$40,000+	11.8	13.6	+15.3

Source: *CSA*/Leo Shapiro & Associates

The target instant camera shopper, the *CSA*/Shapiro survey shows, is an affluent consumer (earning more than $30,000 annually) with a large family (three or four children) and holding either a clerical, sales or managerial position.

But there's good news for retailers who hope to beef up their instant camera sales: This group feels it's time to buy. More than 63% (compared with a 46.5% average) believe it's a good time to make a major purchase, and almost 60% expect the national economy to improve. □

Dark days for darkroom lines

Home photo-developing equipment is a category that has either been dropped or scaled down by GMers. And with good reason: The classification is targeted at affluent hobbyists, most of whom purchase darkroom equipment at photo specialty outlets.

It's a category that has suffered declining sales since the mid-1970's. According to industry estimates, shipments of photo enlargers alone dropped more than 37%, from 120,000 units in 1978 to 75,000 units in 1982. And in the latest *CSA*/Shapiro consumer poll, home photo-developing equipment was the least purchased item in the past year of the 39 hard lines products tracked.

But there are some bright spots for GMers who stock the pricey photo equipment. It appears that many specialty store shoppers will also consider discounters and other general merchandise outlets. For example, when prospects were asked where they would buy home photo-developing equipment, 61.6% named a specialty store. But among shoppers who had purchased darkroom equipment, only 46.9% mentioned specialty outlets.

Discounters increased their share in the "have bought/might buy" comparison from 11.1% to 15.6%, while Montgomery Ward jumped from 7.7% to 12.5%. Drug stores also made a showing (in college towns, for instance, some drug store outlets stock darkroom equipment, increasing their share from zero to 9.4%).

Despite the category's low sales activity, darkroom equipment prospects are prime retail candidates. They're young—61.6% are between 20 and 34 years old (compared with the 34.4% polling base average).

Darkroom equipment shoppers: young, affluent, educated

Indicator	% of polling base	% of darkroom equipment shoppers	% difference
Age:			
20-34 years old	34.4	61.6	+ 79.1
Income:			
$20,000-30,000	27.5	43.2	+ 57.1
$40,000+	11.8	20.1	+ 70.3
Job:			
Technical	3.8	10.7	+181.6
Sales	6.1	12.9	+111.5
Operative	9.9	21.7	+119.2
Schooling:			
Some college/ college graduate	45.5	71.0	+ 56.0

Source: *CSA*/Leo Shapiro & Associates

They're affluent—20.1% earn more than $40,000 a year. And they're educated—71% have at least attended college.

But for those GMers remaining in the category, the safe formula appears to be to minimize sku's of enlargers and emphasize accessories such as chemicals, chemical trays and photographic paper. □

Home exercise equipment stays in shape

With the renewed health of the American economy in 1983, consumers concerned with personal health and fitness raced out to buy exercise equipment in record numbers.

The *CSA*/Shapiro study shows that more than three times as many households purchased exercise equipment as said they might, with 9.4% of all households making a purchase during '83.

Price, however, is much more important to consumers this year. In the 1982 study, only 27.8% of those polled mentioned price, but 40.3% gave this as the reason to shop a particular store this year. Selection and quality, each cited by 11.2%, are also more important to consumers.

Shoppers expect to pay more for exercise equipment. While last year only 12% said they would spend over $200, 24.3% are considering more expensive—and perhaps more esoteric—equipment now.

Only 8.2% of those polled had no store preference; just two years ago this figure was 46.2%. Sears seems to have benefited the most from this change and is leading the pack, outdistancing rivals Montgomery Ward and Penney, whose market share fell dramatically. Sears is mentioned by 20.4% of consumers as the place they might buy exercise equipment during the coming year, up 7 market share points from last year. Only specialty/sports stores, with 32.9%, get a rating higher than Sears.

But actual purchases made during the year show Sears once again the big winner, garnering 20.6% of households. Specialty stores were shopped by 18.1%, K mart by 9.7%, other discounters by 15.5%, department stores by 8.4% and catalog showrooms by 7.1%. Only K mart, catalogers and Sears showed increases over 1982.

While 4 out of 10 shoppers said they had no brand preference, 23.7% said they wanted a store brand. Part of the reason for Sears' growing market share may be its private label exercise equipment.

***Hedgers, the prime audience** for exercise equipment, lean toward store brands.*

Selection important when choosing a store for sporting goods

Reason for shopping	K mart	Other discounters	Sears	Ward	Penney	Department store	Catalog showroom	Specialty/sports store
Price/discount	78.8%	69.2%	25.6%	29.4%	31.9%	31.8%	71.6%	17.7%
Selection	11.8	8.8	—	13.8	—	32.0	18.4	24.4
Quality	—	2.4	20.8	5.5	—	13.7	—	15.8
Satisfaction/past experience	5.6	—	17.9	14.9	—	9.9	10.0	8.8
Location/convenience	3.8	12.6	9.8	12.0	68.1	6.3	—	13.1
Family works there	—	1.9	2.2	3.8	—	6.3	—	1.2
Service/repair/guarantee	—	—	5.9	11.3	—	—	—	1.6
Not answering/other	—	5.1	17.8	9.3	—	—	—	17.4

Source: *CSA*/Leo Shapiro & Associates

This merchandise combines quality and a fair price, and the chain offers consumers a broad selection.

Hedgers, responding to conflicting emotions about spending for today and saving for tomorrow, seem more likely to buy sporting goods during the coming year than any other group of consumers. Three out of 10 said they would not delay making a sporting goods purchase if they needed to curb spending. Only 1 out of 10 savers and survivors responded similarly.

In addition, hedgers closely fit the profile of those consumers who are likely to buy exercise equipment. More than one-third are white-collar workers, have incomes over $30,000, are college graduates and are between 25 and 39 years old.

Hedgers are also less likely to buy a store brand than the other two groups, and 15.5% chose Sears as their store for sporting goods. Specialty/sports stores appealed to 36.1%. Of the three groups, hedgers are the most concerned with price; 38.7% cited it as the reason to shop a certain store. □

Preppie players save racket sales

Despite industry predictions of a tennis rebound after a fairly steady five-year decline in popularity, consumers are still not flocking to stores to buy tennis rackets.

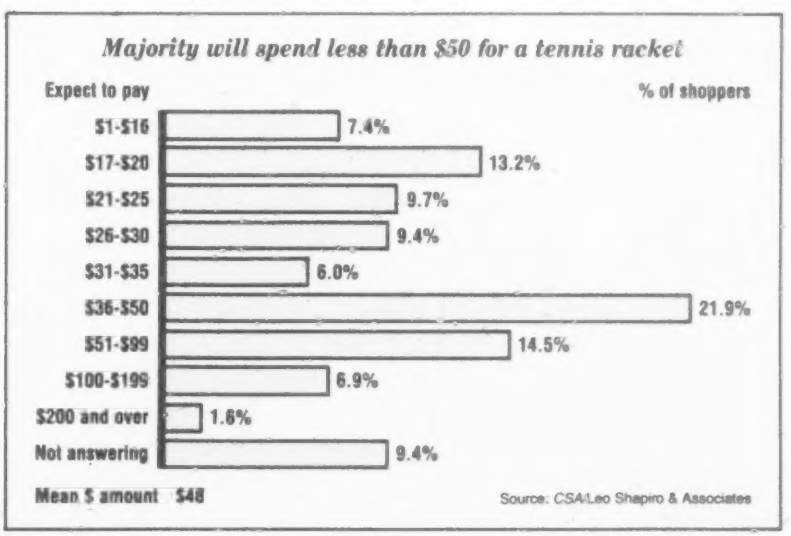
Only 2.2% of consumers in this year's *CSA*/Shapiro study said they might buy a racket during the coming year—the third lowest rating of 39 hard lines products studied in this year's survey.

There is, however, some validity to the stereotype of the tennis buff as a preppie, upper-middle-class sportsman. The study shows that people shopping for a racket are more likely to be professionals with an income over $40,000 and some post-graduate education. They tend to come from smaller households with fewer children than shoppers for other sporting goods products. Almost one-quarter come from the mid-Atlantic region.

This group of shoppers is brand-loyal: 65.6% want an advertised brand (47% chose Wilson, 21% picked Head, 6% Spalding), and 21.3% say there is no chance they would buy a store brand. Over half (53.7%) of all rackets sold during the year were purchased at sports/specialty stores, and a similar number of consumers picked specialty stores as the place they might buy during the coming year.

As a group, savers not only bought more rackets but expected to buy more during the coming year. More than 4 out of 10 savers shopped for tennis rackets at specialty stores.

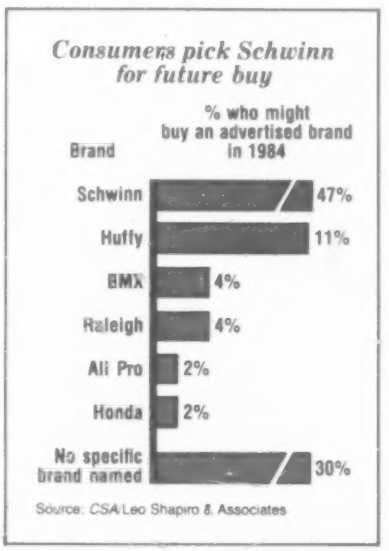
The majority of consumers (67.6%) expected to pay under $50 for a racket, but 8.5% were willing to pay over $100 to improve their game. □



Bikes ride rough path to volume

Quality is more important to bike shoppers this year, and specialty/sports stores are more attractive places to buy than flea markets and secondhand purchases.

In this year's *CSA*/Shapiro study, consumer intention to buy a bicycle climbed to 4.8% after last year's low



of 4.2%, but those households actively shopping the market are down 7 points. Purchases remained flat at 10.3%.

Industry sources are quick to admit that bike sales have been very soft this year, but they're optimistic about an improving picture. Many manufacturers cut their own margins in order to encourage lower retail prices and stimulate unit sales. Nonetheless, consumers expect to pay a mean price of $153, compared to $140 last year.

But bicycles are very vulnerable to economic conditions. Of those consumers who said they might buy during the coming year, 68.1% would delay making the purchase if economic conditions got worse.

Bike shoppers are, however, aware of brands; just 32.3% said they had no brand preference. Similarly, only 13.8% said they had no store preference. Discount stores, catalog showrooms and specialty/sports stores all gained market share over last year. □

***General merchandise chains are** the preferred outlet for file cabinets.*

Paperwork pushes shoppers into file cabinet market

Both consumer demand and sales of file cabinets for home use are growing. Planned purchases of files jumped 19%, compared to a year ago, reveals the *CSA*/Shapiro study. This gain follows on the heels of last year's 10.5% increase in demand.

Actual sales of file cabinets increased by 50% in one year. This year, 4.2% of respondents said they bought at least one file cabinet.

Because of the utilitarian nature of a file cabinet, more than half of all shoppers said they weren't looking for any particular brand. And even those potential purchasers who did have a preference were equally divided between wanting an advertised name and a store brand.

This desire for a store brand is particularly good news for three major GM chains that rated highly as potential outlets for file cabinets. Sears was the No. 1 choice, cited by 21.6%. K mart was mentioned by 11.5%, and Montgomery Ward was picked by 10.4%.

Compared to a year ago, Sears, Penney and Ward all chalked up strong gains (approximately 36%) in the number of shoppers who said they would probably go to the mass merchandisers.

All shoppers who bought a file cabinet this year showed a strong preference for general merchandise chains. Nearly 3 out of 5 purchasers (57.7%) said they went to a chain. Discounters (with 26.9% of respondents saying they bought there) and mass merchandisers (26%) were only slightly less shopped than office products stores, cited by 27.9%.

Most shoppers (45.8%) who gave a reason for picking a particular store to shop in 1984 gave price/discount as the reason they planned to shop there. Quality was the second most important reason for shopping a store (14.5%).

All occupations, except laborers, farmers and military personnel, are well represented among potential purchasers, with their portion of shoppers equaling or beating their segment of the general population.

But family income among next year's planned buyers showed a dramatic split. Shoppers with incomes above $20,000 outpace the national average of families with the same incomes by nearly 50%. Potential purchasers with incomes below $20,000 equaled less than half their segment of the national population.

Families with children also tend to lead potential purchaser statistics. Compared to the national makeup of households, families with children are more likely to be in the market for a file cabinet than families with none. Half of those who bought a unit this year or planned to buy in 1984 have at least one child, while this group makes up only 42.2% of all survey respondents. Families with no children, 57.3% of all households, accounted for only half of all cabinet sales. □

Age of file cabinet shoppers rises*

Age	% of polling base	% who purchased or might buy	% difference
Under 20	1.4	0.6	−57.1
20-24	8.9	9.0	+ 1.1
25-29	11.7	21.3	+82.1
30-34	13.8	12.9	− 6.5
35-39	16.5	16.7	+49.5
40-44	8.7	7.6	−12.6
45-49	6.9	6.8	− 1.4
50-54	7.6	9.6	+26.3
55-59	7.0	7.9	+12.9
Over 60	21.2	[illegible]	−63.7

*Average age 1981: 36; 1982: 37.2; [illegible]: 39.3
Source: *CSA* Leo J. Shapiro & Associates

Typewriters write strong ticket

"Once people decide they need a typewriter," says a buyer for Sears, "they may wait for a price promotion, but they *will* buy the unit."

This need for a typewriter, particularly among families with college-bound children, may be the primary reason for the stability in the market. Although 71.7% of prospective purchasers in this year's

CSA/Shapiro study said they would delay if they cut back on family spending, there is a very good chance they would not.

Nearly the same number of shoppers (71.1%) in the 1982 study said they would delay their purchase. But actual purchases this year reflect a 147.1% gain over the number of people who said they were planning to buy a year ago.

Families with high school-age children continue to be the strongest group of typewriter shoppers. While making up 20.4% of survey respondents, they account for 35.3% of those who bought or plan to buy a typewriter.

Buying a new typewriter is not essential. More people (14.8%) said they bought a secondhand unit from a private party or at a garage sale than any other product in the study.

The 34.5% gain in the number of people who bought secondhand this year didn't come at the expense of general merchandise chains, though. Overall sales through the chains increased slightly from 54.8% last year to 55.6% of respondents in '83.

Both Montgomery Ward and Penney showed the greatest gains in actual sales. Ward posted a spectacular 1,033.3% increase in the number of shoppers who said they bought at the chain this year compared to '82, while Penney chalked up a 200% increase. Other discounters lost 50% of their market share. □

Calculators soar as prices tumble

Demand for printing calculators has tripled since 1981. At the same time, price expectations have dropped from $152 in 1981 to $67 this year. Even so, buying intentions for them rate next to last among the 39 hard lines products covered in this year's *CSA*/Shapiro survey.

Only 1.8% of respondents said they were planning to buy a unit next year, compared to 0.6% in the 1981 study. This year, 6.3% of consumers said they bought one.

But while the potential market is relatively small, with only 1½ million units expected to be sold, general merchandisers should garner 3 out of 4 (74.1%) of those sales.

More than a third of consumers (35.2%) named a discount chain as the place they expected to shop for a calculator, while 18.5% cited a mass merchandiser, 16.1% a catalog showroom and 4.3% a full-line department store.

Nearly two-thirds (62.8%) of those who said they purchased a calculator this year bought at a GM chain.

Four out of 10 (43.6%) prospects who gave a reason to shop a store named price, and 10.3% cited either convenient location or selection. All three reasons support the chains' lock on the future market. □

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Specialty chains sew up pattern sales

***A relaxed environment** is the most potent lure in patterns shopping.*

How long can general merchandise chains afford to see 8 market share points disappear from one category before dropping it altogether? As home sewers increasingly turn to specialty stores, other retailers must decide to either aggressively pursue the sewing business or follow the lead of many chains that have cut their losses and dropped out.

Almost 7 out of 10 respondents in this year's *CSA*/Shapiro study who said they might buy a sewing pattern in 1984 planned to make the purchase at a specialty store, up from 62.2% last year. In addition, 71.9% of the consumers who purchased a pattern during the past 12 months bought it at a specialty sewing shop, an increase from the 63.9% in '82.

But in fact the sewing industry in the 1980's has been relatively static, and this year has been no exception. The continued increases in sales and earnings by the specialty chains have been generated by the shakeout in the industry (Penney most recently jettisoned sewing), not by any real expansion in the market.

Those GMers that are still in the sewing business seldom emphasize the category, usually offering a limited selection of fabrics and notions and one line of patterns. This "convenience category" strategy has backfired. Although it may appeal to shoppers already in the store, it certainly doesn't lure customers to make a separate trip.

Selection is the key to winning back the sewing business. It was cited by 45.1% of respondents as the reason they preferred to shop specialty stores. While 26.6% said they had no particular brand preference for patterns (up from last year's 18.7%), there was strong brand awareness. Of those saying they might buy a pattern during the coming year, 71.3% stated a preference for a national brand.

As the major pattern companies work with big name designers and offer current ready-to-wear fashions, the home sewer chooses to sew as much for fashion as for economy. Just as the ready-to-wear customer likes to shop more than one store for apparel, the home sewer likes to choose from more than one pattern company, as each features certain specialties and designers. The specialty stores offer this convenience.

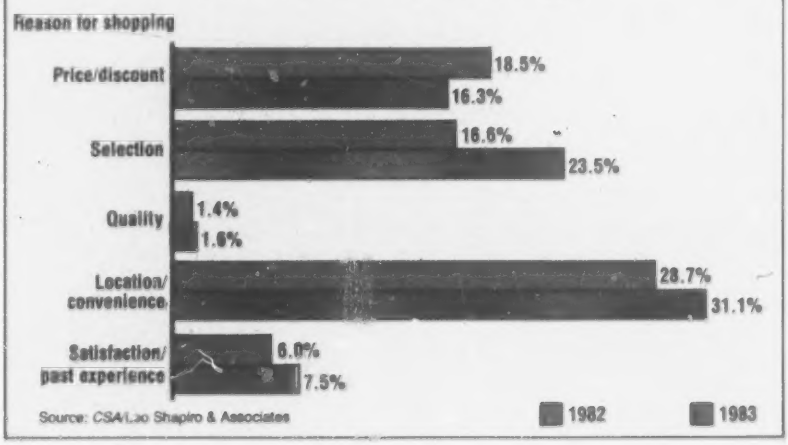
The study shows that people interested in buying patterns are among the most active shoppers of any hard lines category surveyed, with the third highest incidence of both past year purchases and prospective purchases. The percentage of households that might buy in the coming year increased one full point from '82, with 9.5% expecting to be in the market next year.

Patterns are also perceived as the least expensive of the 39 hard lines items studied, with 79.2% of respondents expecting to pay $5 or less for a pattern. Of that figure, 37.7% said they would pay $2.

Patterns are also one of the most likely products to be purchased even if shoppers are forced to curb spending in '84. Just 3 out of 10 said they would delay making a purchase if they had to cut back. The majority of potential pattern shoppers (53.1%), however, are not presently cutting back on clothing purchases due to inflation or decreased income and have a generally positive outlook on their personal financial stability and economic recovery.

Interest in patterns is not restricted to any one age, economic or social group. Among prospective customers, one-third of the chief family breadwinners are white-col-

Convenience draws pattern shoppers



Source: *CSA*/Leo Shapiro & Associates

lar workers, and 61.6% have family incomes over $20,000. The largest single group—38.7%—are high school graduates. Over one-third are 50 or older, and another 29.6% are between 30 and 39. □

Big 3 make crafty gains with kits

Retailers keying their needlecraft kit business to grandmothers had better shake off the cobwebs, forget the stereotypes and take a good look at who's buying craft kits, where she shops and why.

The *CSA*/Shapiro study shows that of all consumers who say they might buy a craft kit (for example, needlepoint, latch hook or quilting) in the coming year, 36.7% are between 30 and 39 years old. Only 26.1% are over 50 years old, less than the national average of 35.8%.

Needlecraft enthusiasts are not merely pursuing this activity in lieu of some other form of leisure-time interest or because they can't afford other hobbies. Almost 7 out of 10 (67.8%) boast household incomes over $20,000. The chief breadwinner in 19.8% of the households is a manager. Another 15.3% are professionals; only 10.6% are retired.

While the potential buyer for craft kits is not immune to price considerations, selection is even more important in choosing where to buy. Fewer consumers this year (just 12% vs. 19.5% last year) said they had no store preference, and 10.8% gave the nod to the Big 3 mass merchandise chains—Penney, Sears and Montgomery Ward—as the places they might buy during the coming year. In last year's study no one mentioned a Big 3 store for craft kit purchases.

At the same time, specialty stores are still the favorite places to buy craft kits, while discounters and full-line department stores are losing these sales.

The reasons for shopping a particular store vary, even among the Big 3. Three out of 10 Sears shoppers cited location/convenience. Selection and satisfaction with past experiences rated highest for Ward customers. Penney was named for location and selection. Two out of 10 shoppers chose the Big 3 chains for price.

***The craft kit shopper** is willing to spend more to get exactly what she wants.*

Discount stores, on the other hand, were rated highly by 4 out of 10 shoppers for price/discount (this jumped to 7 out of 10 for K mart shoppers).

There is no strong brand preference for craft kits. This may be because they are chosen for esthetic appeal and end use—and there are no designer name kits yet. Because of the increased popularity of homedec crafts, consumers see their handiwork as part of their home furnishings and are willing to spend more to get exactly what they want.

Consumers expect to pay more for a craft kit this year. While in the 1982 study 15% expected to pay $6 or $7, this year 20.2% pegged the price tag between $10 and $12. An additional 11.5% thought the kit would cost $15 or $16.

Half of all consumers said they would go ahead with a purchase even if they had to curb their spending next year. These prospective consumers were among the most optimistic about the economy.

While the study shows a slight drop in the number of people surveyed who actually purchased a craft kit, from 15.6% in '82 to 14.7% in '83, consumer intention to buy is up slightly from last year's 5.3% to 6.4% this year. Four out of 10 shoppers said they had actively shopped the market (checking prices, selection, etc.), one of the highest percentages of any hard lines product in the study. □

Selection edges up on price for sewing and crafts

Reason for shopping	K mart	Other discounters	Sears	Ward	Penney	Specialty store	Department store
Price/discount	71.0%	41.0%	21.5%	21.1%	21.8%	10.8%	14.0%
Selection	8.3	15.0	18.6	28.1	27.8	45.1	14.0
Quality	—	3.5	8.9	7.1	—	1.8	16.0
Satisfaction/past experience	3.8	—	—	27.1	—	8.6	2.6
Location/convenience	8.8	33.6	30.0	16.6	27.8	22.4	32.2
Family works there/ they know me	4.4	—	10.5	—	—	0.4	7.7
Have account there	—	—	10.5	—	11.3	—	—
Other/not answering	3.7	6.9	—	—	11.3	10.9	13.5

Source: *CSA*/Leo Shapiro & Associates

Discounters pocket watch sales

***Three quarters of shoppers** polled preferred to buy an advertised watch brand.*

There are nearly as many contradictions in the watch market as there are hours in the day.

Nearly five times as many consumers purchased a watch during 1983 as said they might buy during the coming year, according to the CSA/Shapiro study. Surprisingly, shoppers are not making these purchases at specialty/jewelry stores.

Jewelry stores were cited by 22.7% as the place where they might buy a watch during the coming year, but only 16.2% actually bought a watch from a jeweler this year. Discounters, on the other hand, clocked a 29.2% share of the market in '83, with 27.9% targeting these chains for future purchases.

The availability of brand name watches at discounters and the recent introduction of inexpensive quartz lines from Lorus and Swatch means that the price-conscious shopper can buy a dependable watch between $10 and $50, the price range mentioned by 52.1%.

In addition, various retailers now stock inexpensive, throwaway digitals, often priced under $5, near checkout areas for impulse purchases—the price 1.7% of consumers expected to pay for a watch.

Even grocery, drug and variety stores are ticking off part of the business. Although only 4.5% said they might buy from these retailers in the coming year, those outlets actually garnered 8.6% of the market in '83.

Of all the product categories included in this year's study, watches turned in the highest past purchase rate (30.1% of all consumers polled), but one of the lowest active shopper ratios: Only 2 out of 10 consumers who said they might buy a watch have actively shopped for one in the past few months. But industry sources say the majority are purchased as gifts—Christmas and graduation being peak seasons—and often are not preplanned expenses.

Watches appeal to a broad spectrum of shoppers, and three-quarters said they preferred an advertised brand. Over half who said they might buy during the year are between 25 and 44 years old and are employed. Apparently, most workers feel a need for a watch, although they seemed willing to settle for a utilitarian timepiece over a fancy dress watch. Only 8% said they expected to spend more than $200, with a slim 1% jumping over the $1,000 benchmark.

This bodes well for popularly priced name brand watches, especially those like Timex and Lorus, which are prominently featured throughout all levels of retailing.

But watches are sensitive to the economy. While more than 6 out of 10 shoppers would delay making a purchase if the economy worsened, the majority were optimistic about the future.

Hedgers are the most likely to delay a purchase, and savers are more apt to go ahead. Only savers were more inclined to buy a watch at a jewelry store—25.1%. Hedgers were the least likely, with only 5% mentioning jewelers.

Obviously, the introduction of brand name watches into general merchandise chains has hurt jewelers, who may be forced to discount their watches if they hope to continue to attract inexpensive watch sales, which are still the heart of the business. □

Price-conscious shoppers choose Timex

Brand	% of consumers who want an advertised brand
Timex	43%
Seiko	18%
Bulova	8%
Pulsar	3%
Casio	3%
Omega	2%
Texas Instruments	2%
Benrus	1%
Citizen	1%
Hamilton	1%
Wittnauer	1%
Nelsonic	1%
Baume & Mercier	1%
No specific name mentioned	15%

Source: CSA/Leo Shapiro & Associates

October presages happy holiday season

Major chains	% change	October sales* 1983	October sales* 1982	Stores 1983	Stores 1982	9-mo. sales 1983	9-mo. sales 1982	% change
Sears[1,6]	+32.0	2,103,776	1,593,725	890	913	16,543,964	14,321,656	+15.5
Penney	+ 8.0	836,000	774,000	2,035	2,063	7,142,000	6,870,000	+ 4.0
Ward[1]	+ 4.3	464,700	445,700	376	389	4,068,500	3,853,400	+ 5.6
Federated[5]	+ 9.3	678,200	620,400	547	496	5,812,800	5,099,900	+14.0
Dayton Hudson	+20.3	517,300	430,000	1,073	960	4,460,500	3,635,700	+22.7
May Dept. Stores	+14.0	324,900	285,100	1,540	1,368	2,777,200	2,407,700	+15.3
R. H. Macy	+15.5	303,900	263,100	93	92	2,519,000	2,136,700	+17.9
Allied Stores	+15.6	287,100	248,400	568	530	2,443,300	2,135,800	+14.4
Carter Hawley Hale	+20.9	289,000	239,100	1,071	1,013	2,340,800	1,992,800	+17.5
Associated Dry Goods	+24.9	301,600	241,400	327	251	2,411,000	2,035,000	+18.5
Mercantile	+11.5	134,879	120,945	86	83	1,065,738	936,442	+13.8
K mart	+10.6	1,309,100	1,184,100	2,146	2,101	12,947,900	11,635,800	+11.3
Woolworth	+ 7.0	400,594	374,441	N/A	N/A	3,736,188	3,532,477	+ 5.8
Wal-Mart	+39.7	422,000	302,000	627	536	3,117,000	2,282,000	+36.6
Household Merch.[2,3,5]	- 4.7	235,989	247,709	3,710	3,795	2,011,261	2,100,603	- 4.3
T.G. & Y.	- 8.1	156,705	170,459	830	923	1,364,510	1,449,394	- 5.9
Zayre[4]	+20.4	222,513	184,779	732	617	1,751,366	1,470,969	+19.1
Bradlees	+36.1	100,200	73,600	123	99	750,200	552,400	+35.8
Murphy	+ 7.9	65,430	60,643	4.6	427	592,900	575,185	+ 3.1
Rose's	+29.6	59,118	45,604	245	239	547,227	440,158	+24.3
Heck's	+11.1	38,000	34,200	121	119	328,100	298,700	+ 9.8
Jamesway	+35.0	35,846	26,544	78	67	283,483	226,816	+25.0
Melville	+21.7	293,374	241,019	5,703	5,430	2,868,747	2,425,332	+18.3
Tandy	+ 9.5	207,352	189,324	N/A	N/A	1,767,630	1,515,242	+16.7
Edison Bros.	+11.9	77,336	69,104	2,162	2,129	793,216	718,069	+10.5
The Gap	+10.9	29,500	26,600	566	546	311,600	295,900	+ 5.3
Totals & Averages	+17.0	9,737,787	8,321,537	—	—	83,391,620	73,494,749	+13.5

*000 omitted. N.C. = no change. N/A = not available.
[1]Store number for full-line outlets only. [2]Includes 2,838 franchise stores (vs. 2,826 a year ago). [3]Includes T.G. & Y. sales. [4]Includes 273 Zayre stores (vs. 265 a year ago), 348 Hit or Miss stores (vs. 271) and 111 T. J. Maxx stores (vs. 81). [5]Excludes supermarket sales. [6]Includes results from Simpson-Sears.

Newsbriefs

Sears and Montgomery Ward posted third-quarter earnings. Sears U.S. Merchandising income increased 67.9% to $135.8 million. For nine months, income was up 71.5% to $247.5 million. . . . **Ward turned** a $38 million loss into a $2 million gain in the quarter. For nine months the company posted a $13 million loss against a $109 million loss a year ago. . . . **Two New York department stores** have invaded new turfs to early favorable returns. Macy's has opened in Miami and Bloomingdale's in Dallas. . . . **K mart has launched** a new apparel department prototype outside Troy, Mich., sporting freestanding finger walls, new signing (including neon), and significantly more rounders and waterfalls. . . . **Kentucky-based Dollar General** has agreed to buy 275 P. N. Hirsch stores from Interco. The stores would add at least $110 million in sales to D.G.'s '82 volume of $290 million generated from 883 stores. . . . **Connecticut-based Caldor** has rolled out 1,000-sq.-ft. sections devoted to petite sizes in its 91 stores. . . . **Next month Johnny Carson** labels will debut in Sears. Suits will go for $175, sports coats for $110-$115. Hartmarx will make the line. . . . **Wholesale Clubs** continue to attract attention. W. R. Grace is moving to purchase part of Chicago's Warehouse Club, Pay 'n Save will open a club in the Northwest. . . . **Wal-Mart,** operator of three wholesale clubs, is testing a deep discount drug store in Des Moines. . . . **Retailing pays senior women** execs more than any other industry—$107,000 a year on average, says Korn Ferry International. . . . **Toys "R" Us** plans expansion limited to no more than 10 stores in '84 for its Kids "R" Us division. . . . **Sears will spend** $1.7 billion over the next five years to build 62 new "stores of the future" and renovate 600 older ones to the concept. In '84, 14 new and 85 remodeled stores will come on line. . . . **Burdines, Computer-Land,** VideoConcepts and A.T.&T. Phone Center Stores have begun selling videotex terminals in Miami at $600 apiece. The terminals provide Viewtron, an interactive informational, banking and shopping service linked to the television and telephone.

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Chain Store Age

GENERAL MERCHANDISE EDITION January 1984

OLYMPIC MERCHANDISING

REACHING FOR THE GOLD

TWO DOLLARS PER ISSUE

IN THIS ISSUE

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spending continuing to provide a real underpinning to the economy. We're just too early into the recovery to really disrupt consumer psychology."

Woolworth economist Martin Tolep agrees. "I could always draw you a scenario that would kill it [consumer spending]," he says. "I could always say that [Federal Reserve chairman] Paul Volker doesn't want Reagan elected and turns off the spigot and lets interest rates surge. The economy then goes into the pits and there goes retailing. But I don't think that's a likely scenario."

Calling the shots: Although consumers are spending more, they're also demanding more in the form of frequent sales and the latest retail buzzword, "value." Retailers have responded with frequent price-slashing promotions that, analysts say, will continue to pressure gross margins in 1984. As one discount chain executive puts it, "This year is going to be a promotional war."

But it will be a battle from strength, not weakness, says J. C. Penney economist Rosalind Welles.

'By and large there are no real negative signs on the horizon for retailers for the first time since 1978'

"If there's a continuation of promotional trends, it's not for the same reasons as we've seen in the past," she explains. "It's not that the economy has weakened and we'll panic as we did last year [1982] to try to get rid of merchandise because inventories were building up. But there's another phenomenon that we're seeing, and that's that consumers are tending to look for things on sale and getting used to buying off-price merchandise. There's no telling how long that's going to last. It's a habit that may be hard to break."

Looking ahead: But many forecasters say 1984 is a successful given, although the fast-paced recovery is expected to slow down to more reasonable post-recession levels—1985 and beyond, they say, may usher in another downturn.

James Newton, an economist for Management Horizons Inc., a Columbus, Ohio-based retail consulting firm, is one of them. Newton is predicting a slow expansion in 1985 and 1986, with another recession arriving in 1987—a timetable consistent with post-World War II business cycles.

The question is whether retailers will be prepared or fall into their previous bad management habits of prosperity. Retail consultant and former Dayton Hudson and Woolworth topsider Allan Pennington believes the lessons of recession will remain indelibly etched in the psyche of industry decision-makers. "I know at Dayton's that fixed costs turned out to be variable costs," he says. "The escalators, they discovered, didn't have to be turned on a half-hour before the store opened."

But those escalators, at least for the short term, should be quite busy. □

Spreading the wealth in '84

It could have been called the year of the big-ticket durable. In 1983 the much-anticipated consumer-stoked recovery was marked by heavy spending on refrigerators, washing machines—anything that could profit from the loosening of pent-up demand and a robust housing recovery.

But with the anticipated rise in discretionary income, retail prognosticators say this year's shopper will spread the wealth among a wider range of products, from jewelry to hand tools.

"It's been a very big-ticket—an auto, housing-related—spending environment, and that will be shifting to other areas," says Susan Sterne, chief economist at the Stowe, Vt.-based Economic Analysis Associates. She adds that consumer spending "will be more broad-based" than in 1983, when there was "an unprecedented percentage of durables to total expenditures."

Apparel and other smaller-ticket items, such as small electric appliances, are expected to log higher-percentage sales increases in 1984 compared with last year's year-to-year rates (see chart). For example, women's and girls' apparel sales are expected to jump 10.4% compared to an estimated 5.2% in 1983. This compares with a smaller growth rate increase in major appliances from last year's estimated 7.1% to 9.1% in 1984.

Downers Grove, Ill.-based retail economist Jay Levine contends the smaller-ticket merchandise prospects are improved by a jump in discretionary income (an estimated 10.2% in 1984, he says) and by a continuation of "fairly high but level interest rates."

Bigger growth expected in soft lines in '84

	Year-to-year change*		
	1981 to 1982	1982 to 1983 (est.)	1983 to 1984 (est.)
Women's & girls' apparel	+3.4%	+ 5.2%	+10.4%
Men's & boys' apparel	+2.2	+ 3.9	+ 9.0
Cosmetics	+4.8	+ 6.1	+ 5.7
Furniture & bedding	−3.6	+ 6.9	+ 4.7
Floor coverings	+3.4	+12.7	+ 8.8
Major appliances	+0.3	+ 7.1	+ 9.1
Small electric appliances	+1.3	+ 7.8	+10.9
TV & radio	+1.0	+ 7.1	+10.3
Lawn & garden	−2.5	+ 7.9	+10.6
Hardware	−1.4	+ 6.7	+10.7
Hand tools	−1.7	+ 8.7	+11.2
Paint	−6.7	+ 7.5	+10.4
Toys†	+1.2	+ 6.3	+ 9.3
Eyewear & orthopedics	−5.1	+ 9.8	+ 7.8

*Percentage changes based on inflated dollars
†Excluding electronics
Source: *Levine Reports*

"This assumed pattern," Levine says in his newsletter, *Levine Reports*, "will be more beneficial to smaller-ticket consumer purchases than major purchases such as home furnishings or automobiles, which require substantial credit usage."

But retail observers say it's really not a matter of which classifications are going to do well—1984 should be a robust year for all general merchandise classifications. □

—Hank Gilman

The "average buyer"

16.6 years in retailing
10.6 years with present company
9 years as a buyer
6.3 years as buyer with present company
38 years old
55.7% don't know when to expect a promotion
65.6% without formal buyer training program
57.4% with college degrees
$37,200 annual salary, 8.3% bonus

Buyers laud superiors, criticize field personnel

When it comes to the numbers game, nobody has been playing it longer, harder or with greater determination than retailers. Numbers can make or break companies and careers. A make-it-or-goodbye attitude permeates all levels of retailing, leading to a degree of mutual distrust between two important groups—store personnel and merchandising staffs. And while an all-out war may not be brewing, skirmishes seem inevitable unless corporate leaders establish a peace.

A *Chain Store Age* survey of headquarters buyers reveals these merchandisers have definite attitudes about their jobs and their supervisors as well as field personnel. Buyers from the five levels of retailing—department, discount, variety and specialty stores, plus the Sears, Penney, Montgomery Ward group, participated in the survey. Buyers were differentiated by retail tier as well as by hard and soft lines buying duties.

The economic doldrums that prevailed prior to 1983's economic rebound may have strained relations between store managers and merchandising staffs as each tried to point a finger at the other for poor sales results. Friction between the two groups definitely exists. Only 20.5% of buyers surveyed rate the capability of store personnel excellent/very good.

CSA takes an in-depth look at headquarters buyers and how they feel about their jobs

On the other hand, last year's *CSA* store manager survey revealed that while corporate leadership received high marks from the men in the field, buyers rated a lukewarm "good" score (see April 1983). Interestingly, discount store buyers, a group composed largely of store level graduates, are the harshest critics of field operations. Six out of 10 say they plan good programs that are never carried out in the field. Two out of 5 department store buyers agree, as do 58.7% of "other" retail buyers. ("Other" includes variety and specialty stores and Sears, Penney, Ward, which are not statistically significant if measured separately.) Hard lines buyers are more critical than soft lines buyers. But if the statement is true, it signals a gross waste of time, planning and money that corporate planners must address.

Buyers are more generous in rating their own bosses—44.3% say their respect for/confidence in superiors is excellent/very good. A similar positive response is given concerning the capability of corporate staffs.

Overall, buyers participate in open dialog with their bosses. Over half say they are encouraged to speak their minds and offer suggestions, and they regard themselves as professionals. More and more, buying is becoming a highly educated profession.

Over half of department store and soft lines buyers say they are treated as professionals by their companies; only one-third of hard lines and discount buyers report this. One apparent sore spot for all buyers is the lack of concern for employees as individuals, with corporate treatment rated fair/poor by 38.5%.

The survey validates the widely held belief that buying has become highly centralized, but what is surprising is the amount of autonomy and freedom buyers perceive they have in making decisions. Department store buyers tout their freedoms the loudest. While one-third of them have all of their decisions reviewed by a supervisor, 73.5% say they can add a line of merchandise without it being reviewed. Over half profess more autonomy than in the past. Soft lines buyers also report greater autonomy, with 68.6% able to add a line without approval.

For discounters, the survey reveals a lower percentage having the freedom to add lines (64.9%), and just 37.8% who have more autonomy.

Training programs: The availability, or lack, of training programs underscores a basic difference in corporate philosophy between department and discount chains. Department stores run efficient merchandising organizations. They have buyer training programs. Price-conscious discounters spotlight store efficiency and train their store managers.

Six out of 10 department store buyers report their companies have a formal training program, but 75.7% of discounters have none at all.

In contrast, the *CSA* store man-

Buyers express their likes and dislikes

	Department store buyers	Discount buyers	All buyers*
What they like most			
Challenge	82.4%	70.3%	73.8%
Responsibility	82.4	59.5	66.4
Merchandising	50.0	62.2	60.7
Dealing with vendors	44.1	43.2	45.9
Independence	44.1	40.5	42.6
Company reputation	35.3	27.0	27.0
Salary	8.8	29.7	21.3
Trust of company	14.7	5.4	7.4
Bonus package	2.9	8.1	4.9
What they like least			
Bonus package	44.1	40.5	39.3
Company's concern for employees	35.3	32.4	33.6
Salary	52.9	18.9	32.8
Benefits package	47.1	29.7	30.3
Work schedule	32.4	27.0	29.5
Job security	23.5	45.9	27.0
Treatment by supervisors	20.6	24.3	20.5
Dealing with vendors	17.6	5.4	10.7
Trust of company	2.9	10.8	8.2

*Includes department, discount, variety, specialty and Big 3 buyers
Source: *Chain Store Age* research

Buyers rate responsibilities

	Hard lines buyers	Soft lines buyers	Department store buyers	Discount store buyers	All buyers*
Maximizing gross margins	53.7%	66.7%	67.6%	59.5%	59.0%
Setting proper assortments/ selection	58.2	60.8	61.8	64.9	59.0
Sales volume increase	35.8	58.8	70.6	24.3	44.3
Maximizing turns	46.3	41.2	47.1	35.1	41.0
Negotiating the best deals	40.3	41.2	20.6	54.1	40.2
Planning	32.8	45.1	50.0	32.4	39.3
Inventory control	38.8	33.3	44.1	45.9	37.7
Ensuring in-stock position	46.3	19.6	29.4	35.1	35.2

*Includes department, discount, variety, specialty and Big 3 buyers
Source: *Chain Store Age* research

Study methodology

Buyers from the five primary tiers of general merchandise retailing were randomly surveyed for this *CSA* study. Each tier was segmented to target hard lines and soft lines buyers. Nine buyer groups were chosen in hard lines categories and six in soft lines.

A total of 500 questionnaires were mailed, of which 122 or 24.4% were returned completed.

The survey went to 50 variety store, 50 hard lines and 50 soft lines specialty store buyers and 100 to the Sears, Penney, Montgomery Ward tier. Surveys also went to 125 discount and 125 department store buyers.

Completed surveys identified buyers by store type and buying category and were strictly confidential. Response rates were department stores 27.2%, discounters 29.6%, hard lines 26.8%, soft lines 20.4%.

The hard lines categories included consumer electronics, housewares, stationery, photo, sporting goods, hardware, domestics, toys and H&BA. Soft lines buyers targeted were those responsible for junior sportswear, misses dresses, outerwear, women's career dressing, men's wear and children's.

ager survey shows that only 24.5% of department store managers have a formal training program, as opposed to 59.5% of discounters.

It is possible that discount management believes in-store training is the best possible teacher (48.6% of discount buyers were assistant/store managers before becoming buyers). Since store personnel see first-hand what sells and why, it's no wonder these buyers are so preoccupied with setting the right assortments and ensuring good in-stock positions—vital elements in a self-service environment.

The lack of formal training for discounters may, in part, explain some of the differences between them and department store buyers. An underlying feeling of insecurity seems to haunt discounters. They applaud the anonymity of centralized decision-making and the lack of autonomy. One-third don't think they are perceived as professionals, and 2 out of 3 criticize store personnel. A whopping 45.9% worry about job security. Not quite 6 out of 10 like their jobs because of the responsibility involved.

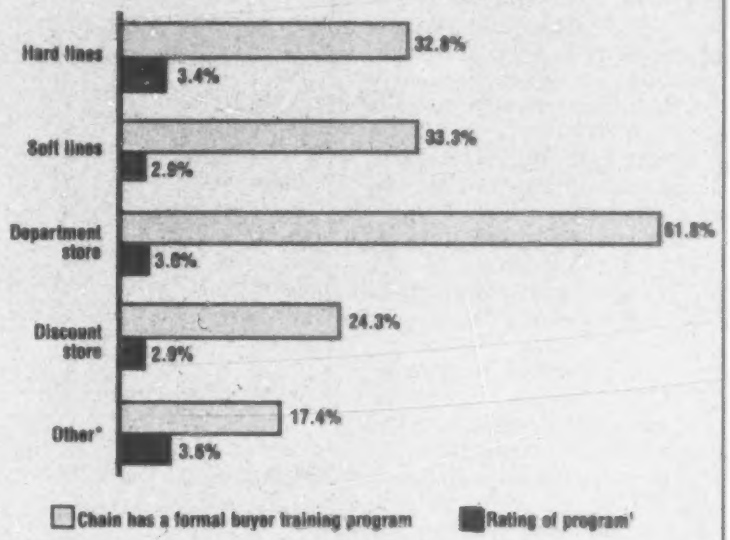
Department store buyers, on the other hand, overwhelmingly say they like the challenge and responsibility of buying (82.4%). According to the survey, this group is young, maybe even brash, and eager to climb the corporate ladder. These Young Turks are optimistic about their chances for promotion.

Despite the differences, buyers do recognize the need to get product and trend information. Their No. 1 source is the salesman, cited by 9 out of 10 buyers. Although there seems to be some tendency to reduce the amount of purchasing from manufacturers' reps, over half of all buyers surveyed cite them as well as trade shows and trade news articles as additional sources.

Six out of 10 point to the competition as a place to garner tips, with soft lines buyers—on the watch for fast-developing fashion trends—leading the rest in shopping the competition. Buyers visit both non-headquarters stores and the competition about every two weeks.

Rating the job: Along with chal-

Buyers cite need for more training programs



†Ratings based on a scale of 1 to 5, with 1 being poor and 5 excellent
*Includes variety and specialty stores and Big 3
Source: *Chain Store Age* research

Merchants express their attitudes toward buying

Agree				Disagree		
Department store buyer	Discount buyer	All buyers*	Statement	Department store buyer	Discount buyer	All buyers*
44.1%	64.9%	54.1%	We lay out good programs at HQ that never get implemented at store level	30.3%	24.3%	27.9%
73.5	64.9	63.1	I have the freedom to add a line of merchandise by myself	21.2	27.0	22.2
52.9	37.8	45.9	I have more buying autonomy than in the past	24.3	16.2	21.3
32.4	43.2	36.9	All my buying decisions are reviewed by a supervisor	51.6	43.2	48.3
26.5	37.8	34.4	I am constantly being asked to narrow my assortments	48.5	32.4	38.5

*Includes department, discount, variety, specialty and Big 3 buyers
Source: *Chain Store Age* research

Buyers rate their chains on . . .*

	Hard lines buyers	Soft lines buyers	Department store buyers	Discount store buyers	All buyers†
Recognizing performers within the organization	3.2	3.1	3.2	2.9	3.1
Treatment of employee as a professional buyer	3.2	3.4	3.5	3.1	3.3
Capability of store level staff	2.8	2.8	2.7	2.8	2.8
Capability of corporate level staff	3.5	3.4	3.3	3.3	3.4
Company's overall concern for employees	3.0	2.8	2.9	2.9	2.9
Opportunities for promotion and salary increases	2.8	2.6	3.0	2.6	2.8

*Ratings based on a scale of 1 to 5, with 1 being poor and 5 excellent
†Includes department, discount, variety, specialty and Big 3 buyers
Source: *Chain Store Age* research